

Small Group quoting: getting started guide

This guide provides a high-level overview of the available features for managing your small group prospects, new groups and renewals from the Broker Portal.



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HEALTHCARE

Contents

- Access the Broker Portal 3**
- Manage Prospects & New Groups..... 3**
 - Access Manage Prospects & New Groups3
 - Create a Quick Quote4
 - Create a quote for a new Small Group Prospect.....4
 - Review quote details5
 - Complete New Prospect Group setup6
- Manage Renewals..... 6**
 - Access Manage Renewals6
 - Small Group Renewal.....7
- View Book of Business..... 8**
 - Access View Book of Business8
 - View Company Details.....8
 - Add New Insurance Product.....8

Access the Broker Portal

Login to the Univera Healthcare Broker Portal at Broker.UniveraHealthcare.com/Login:

Broker Login

Username

Password

[Forgot Username?](#) | [Forgot Password?](#)

[Log In](#)

Manage Prospects & New Groups

Access Manage Prospects & New Groups

From the navigation menu, select **Enroll & Update > Group > New Group Paperwork**, then **Quote & manage** to launch Manage Prospects & New Groups.



Brokers

[Home](#) [Enroll & Update](#) [Compare Plans](#) [Billing](#) [Commissions](#)

[Brokers](#) [Enroll & Update](#) [Group](#) [New Group Paperwork](#)

New Group Paperwork

[Small Group Checklist](#) [Mid/Large Group Checklist](#)

Manage Prospects and New Groups

Access Manage Prospects & New Groups to quote, sell, and manage new Small Group prospects.

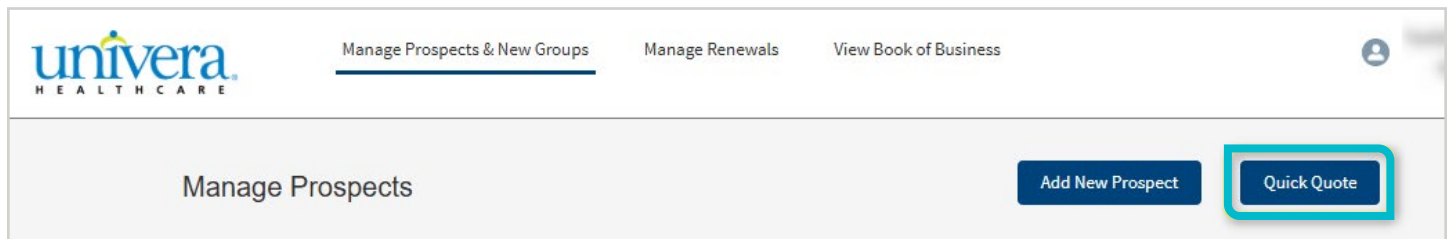
- Instant access to create and download Small Group quotes
- Access Benefit Summary and Summary of Benefits & Coverage (SBC) documents
- Electronically complete the New Group Application and upload any required documentation
- Track the status of your prospects and new group submissions

[Quote & manage](#)



Create a Quick Quote

Select **Quick Quote** to create a quote without adding a prospect to the system.



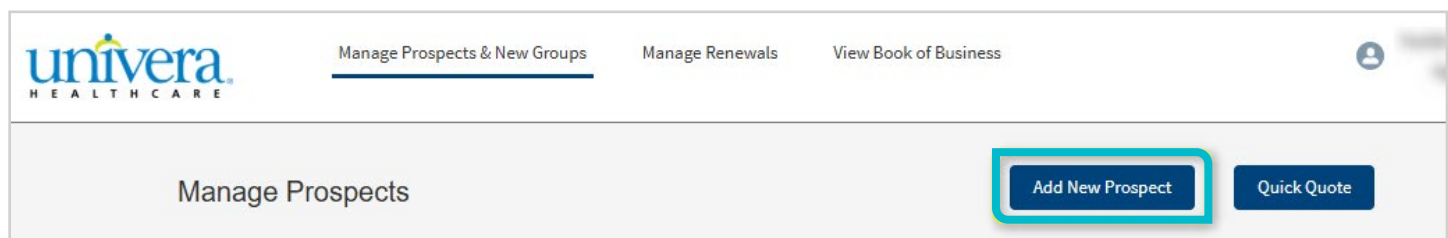
To create a Quick Quote, enter limited details about the quote, then continue to plan selection and create a quote. Once created, you may download or email a PDF of the quote.

Helpful hints

- Select plan filters on the Medical Plan Coverage Options step to narrow search results
- Update the required Medical Plan Coverage Options as needed by returning to the step throughout plan selection
- Compare search results by selecting the Compare checkbox(es) and then clicking **Compare**
- View Benefit Summaries and Summary of Benefits and Coverages by clicking on the applicable link(s)

Create a quote for a new Small Group Prospect

Select Add New Prospect to create a quote for a new prospect enrolling with Univera Healthcare.



To add a new prospect, enter basic company details to verify that the group is eligible for Univera Healthcare small group coverage, and then continue to plan selection and create a quote.

Helpful hints

- Select plan filters on the Medical Plan Coverage Options step to narrow search results
- Update the required Medical Plan Coverage Options as needed by returning to the step throughout plan selection
- Compare search results by selecting the Compare checkbox(es) and then clicking **Compare**
- View Benefit Summaries and Summary of Benefits and Coverages by clicking on the applicable link(s)

Review quote details

After a new prospect or renewal quote has been created, review the quote to Download, Email, Modify, or Accept the quote.

Manage Prospects & New Groups > Bob's Tire Shop, LLC > Quote Details

Quote Details

[Accept Quote](#) [Modify Quote](#)

Group Name: Bob's Tire Shop, LLC	Group ID:	Quote Created Date: 09/02/2026	Quote Effective Date: 11/01/2026	Quote Expiration Date: 11/30/2026
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[Download Quotes](#) [Email Quote](#)

Medical

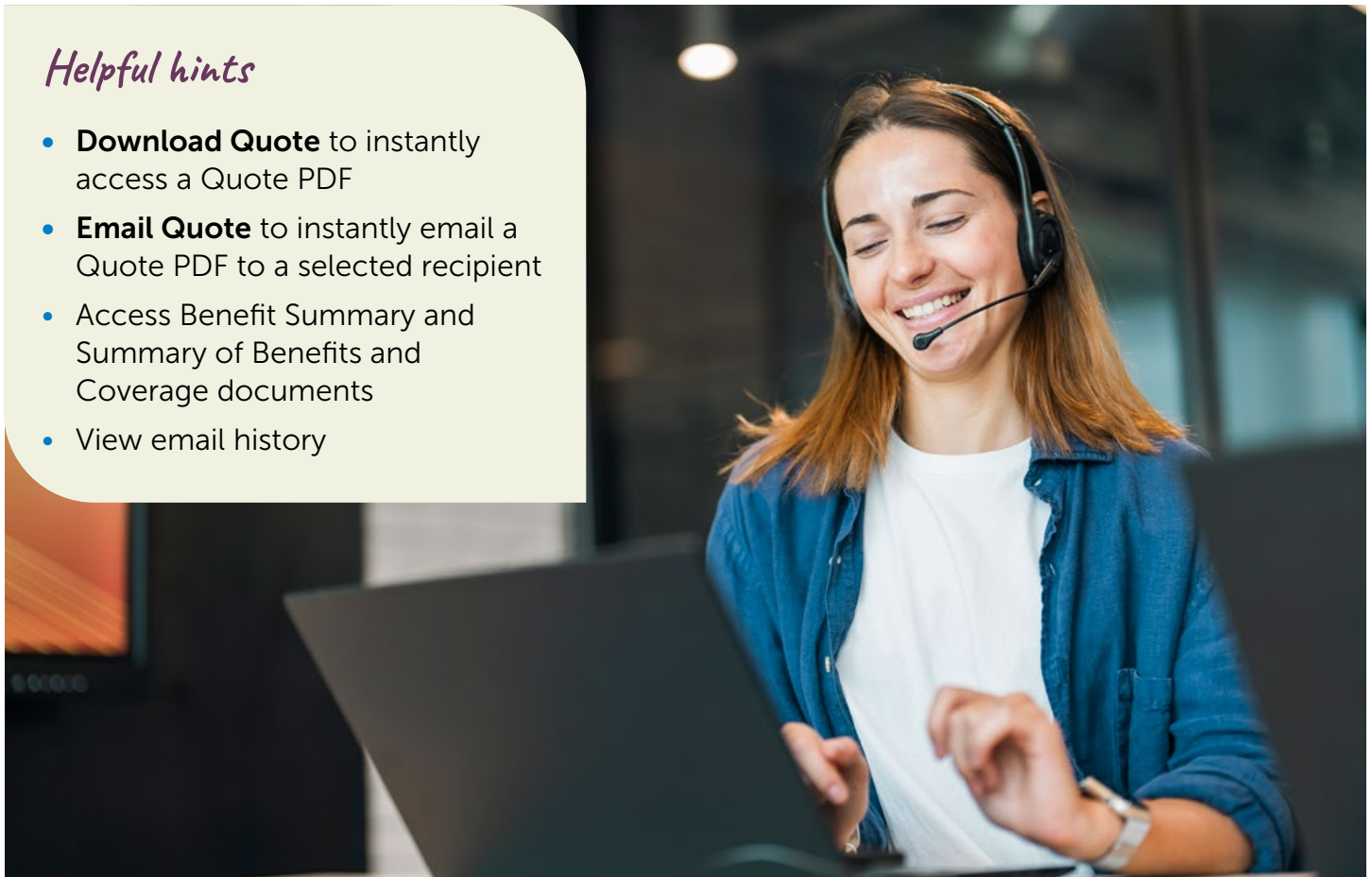
PLAN NAME	ENROLLMENT CODE	EMPLOYEE ONLY	EMP/SPOUSE	EMP/CHILD(REN)	EMP/FAMILY	
Univera Access Platinum 1	TKV2	\$1,062.83	\$2,125.66	\$1,806.81	\$3,029.07	Benefit Summary
Univera Access Gold 5	TLT2	\$854.57	\$1,709.14	\$1,452.77	\$2,435.52	SBC

Number of Rows: 5

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Helpful hints

- **Download Quote** to instantly access a Quote PDF
- **Email Quote** to instantly email a Quote PDF to a selected recipient
- Access Benefit Summary and Summary of Benefits and Coverage documents
- View email history



Complete New Prospect Group setup

View and access your prospect from the Small Group Prospects list under Manage Prospects & New Groups. Select **Accept Quote** from the newly created New Prospect Quote to begin group setup.

Manage Prospect & New Groups > Bob's Tire Shop, LLC

Prospect Details

Prospect: Bob's Tire Shop, LLC	Type: Small Group Commercial	# Employees: 22	Effective Date: 11/01/2026	Your Agency: [Redacted]
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Documents & Downloads

Prospect Status

✓

Quote Pending

Group Setup Pendi...

Underwriting Review

Group Setup Proce...

Group Setup Comp...

Complete

Next Step

You have created a quote! Please review, modify, and/or accept the quote.

Accept Quote

Review Quote

Complete the guided workflow, including the Employer Application and required Supporting Documentation uploads. Review the Group Setup summary, then **Submit**.

Once a group has been submitted, track the status using the Prospect Status tracker on the Prospect Details Page.

Manage Renewals

Access Manage Renewals

From the navigation menu, select **Enroll & Update > Group > Renewal Group Paperwork**, then **Renew** to launch Manage Renewals.

univera HEALTHCARE Brokers

Home Enroll & Update Compare Plans Billing Commission

Brokers > Enroll & Update > Group > Renewal Group Paperwork

Renewal Group Paperwork

[Small Group Checklist](#) [Mid/Large Group Checklist](#)

Manage Renewals

Access Manage Renewals to view, quote, and update your upcoming renewals:

- View a complete listing of your agency's upcoming Small Group renewals
- Shop for alternative renewal plans and instantly download new Small Group quotes
- Complete a guided workflow to renew with changes and upload any required documentation
- Track the status of your auto-renewals with changes

Renew

Small Group Renewal

View and access your agency's upcoming renewals from the Small Group Renewals list under Manage Renewals.

To start a renewal, click **View Group** from Actions to access the renewal Group Details Page, then click **Review Quote**.

Small Group Renewals						
Search						
GROUP NAME	CUSTOMER NUMBER	RENEWAL DATE	GROUP INVOICE DAY	LINE OF BUSINESS	RENEWAL STATUS	Actions
ABC Insurance Co.	12345678	12/01/2026	16	Commercial	Quote Pending	View Group
DEF Insurance Co.	87654321	12/01/2026	16	Commercial	Quote Pending	
GHI Insurance Co.	98765432	12/01/2026	16	Commercial	Quote Pending	

Renewal Status

Quote Pending

Underwriting Review

Group Setup Processing

Group Setup Complete

Complete

This group will be auto-renewed as is on 11/09/2026. If renewal changes are not submitted electronically by 11/09/2026, you will need to contact your Sales Representative to make renewal changes.

Next Step

You have created a renewal quote! If renewing as is, there is no action needed and the group will be auto-renewed. If changes are necessary please review, modify, and submit renewal changes prior to the auto-renewal date.

Review Quote

Review the recommended plans for renewal based on the group's current plans, then create a quote by shopping for alternative plans.

To complete renewal group setup, complete the guided workflow and required Supporting Documentation uploads, then click **Submit**.

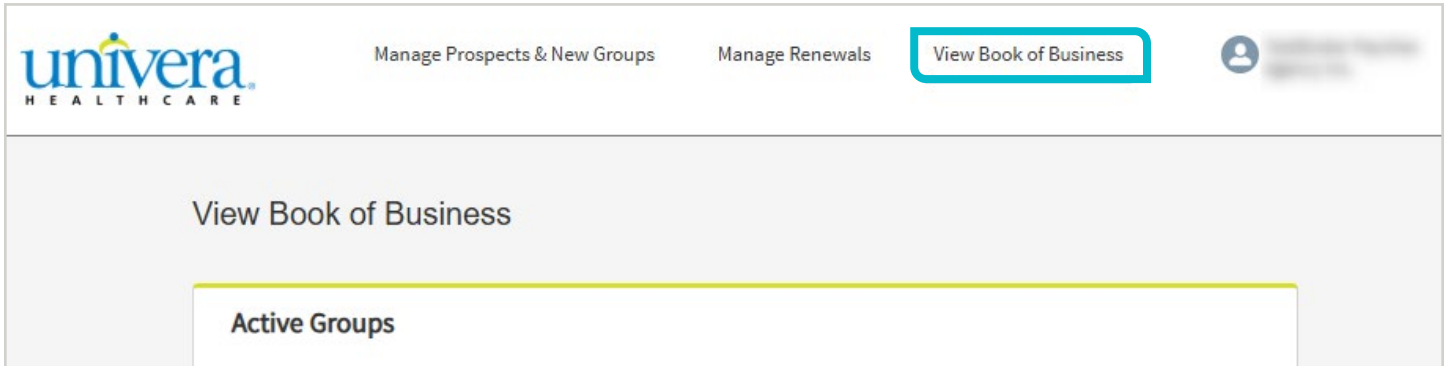
Once a renewal has been submitted, track the status using the Renewal Status tracker on the Group Details page.

Helpful hints

- Small Group Renewals will be available 90 days prior to the effective date, unless a completed Annual Group Information Form has not been received
- Groups will be auto-renewed as is on the indicated date in the Renewal Status tracker, unless a completed Annual Group Information Form has not been received
- Download a rate sheet for signature to be uploaded in Supporting Documentation

View Book of Business

Access View Book of Business



The screenshot shows the Univera Health Care dashboard. At the top, there are navigation links: 'Manage Prospects & New Groups', 'Manage Renewals', and 'View Book of Business' (which is highlighted with a red border). To the right of these links is a user profile icon. Below the navigation bar, the main heading 'View Book of Business' is displayed. Underneath this heading, there is a section titled 'Active Groups'.

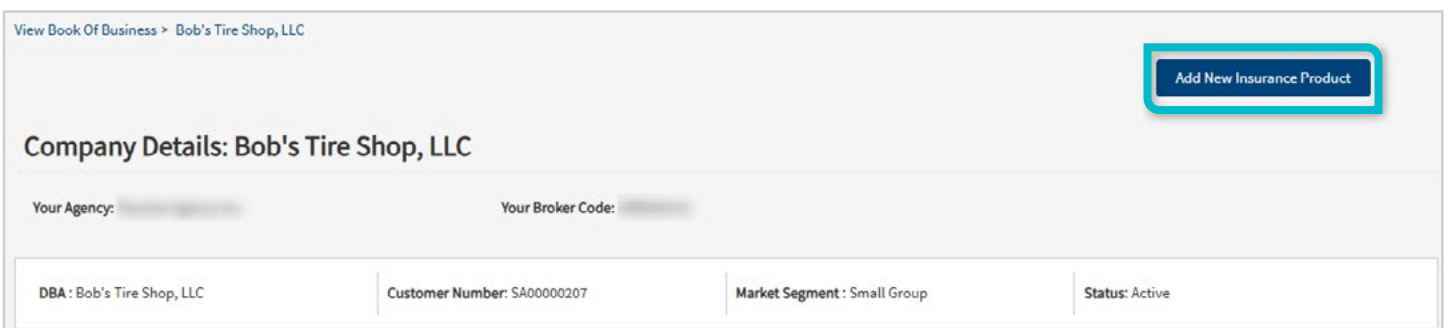
View Company Details

View Book of Business provides access to a complete list of your active groups, as well as any groups that have terminated within the last 60 days.

Select **View Company** from Actions to view account information from the Company Details page, including Account Owner, Demographic information, Contacts, Lines of Business and Open Renewals associated with the company.

Add New Insurance Product

Select **Add New Insurance Product** on the Company Details page to add a new line of business not currently offered by the group



The screenshot shows the 'Company Details: Bob's Tire Shop, LLC' page. At the top, there is a breadcrumb trail: 'View Book Of Business > Bob's Tire Shop, LLC'. On the right side of the page, there is a red button labeled 'Add New Insurance Product'. Below the heading, there are two input fields: 'Your Agency:' and 'Your Broker Code:'. At the bottom of the page, there is a table with four columns: 'DBA: Bob's Tire Shop, LLC', 'Customer Number: SA00000207', 'Market Segment: Small Group', and 'Status: Active'.

Helpful hints

- Only products not currently offered by the group will be available to select
- Add New Insurance Product must be completed for any groups adding a new line of business upon renewal

Create a quote for the new line of business being added, then complete the guided workflow and required Supporting Documentation uploads and click **Submit**.

