A New IDEA for Online Renewals
We heard what you had to say, and we've made our online enrollment tool even easier.

If you already thought it was easy to renew groups with our Idea Management SystemSM (IDEA), wait until you renew a group using our newly upgraded system. The IDEA renewal process is now equipped with automation to allow for real-time renewals. With this new technology, your groups’ plan changes will be instantly uploaded into our system of record, reducing our already fast turnaround from a few days to mere seconds. Now, you have the ability to renew your groups - and communicate with them - more quickly, while further reducing the amount of time that you spend on the renewal process.

What has been improved? In addition to real-time implementation, plan renewals will now be submitted at a group level instead of at the Contract Specific Package (CSP) level. This means that if you have a group with multiple plans, changes for all plans need to be confirmed prior to submission. Submitting all plans together ensures they all meet compliance guidelines when changes are first proposed, eliminating the need for outbound calls and additional revisions.

We’ve also launched a new Renewal Manager screen, which will be the main screen for all renewal transactions. Use this screen to review, compare and modify all of the group’s plans prior to renewal.

The Renewal Manager screen allows you to view high level plan summaries that detail the product, network and gatekeeper, as well as copayment, deductible, and coinsurance amounts, pharmacy information, optional riders and a premium summary. These plan summaries, created for all plans - As-Is and Quoted Plans - provide an overview of plan choices to help you select the best plan options for renewal each year.

The Renewal Manager screen also features a Broker Confirmation section that notes the current brokerage firm, and the broker first name, broker last name, and broker ID number. If the information is available, you will see that the Broker First Name and Broker Last Name fields are pre-populated. (These fields may be edited.)

The following pages will help you navigate step-by-step, through IDEA and the Renewal Process. So, let’s get started.

• View Renewal: View “As-Is” or “Quoted” plans by clicking the link under the Plan column.

• Run Quotes: Click the “View/Modify Quote” link under the Action column to quote and compare plan options or rates.

• Renew Plans: Review your “As-Is” renewals and “Quoted” plans, then select the plans you wish to renew. Confirm you are authorized to submit plan changes and click the Renew button at the bottom of the screen.
Log in

- Go to www.oxfordhealth.com
- Log in to the Broker site with your user name and password.

Home

- Click the “Renew Groups Online” link under the IDEA Management SystemSM menu on the right side of your screen. You will be directed to a search page.

Search page

1. Enter the criteria you wish to search by.
2. Click the Enter button. You will see all of your groups’ information.

Search results

Choose from one of the following four options on the Search Results page:

- View Renewal: Directs you to the Renewal Manager screen
- Run Quotes: Directs you to the Renewal Manager screen
- View/Send Proposal: Allows you to send quoted plans via e-mail, fax, and/or print for personal distribution.
- View Renewal Manager: Directs you to the Renewal Manager screen
- View Summary of Coverage: Generates a PDF of the Summary of Coverage for the selected plan.
Renewal Manager screen

From the Renewal Manager Screen you can perform the following transactions:

**View Renewal**

- To view “As-Is” or “Quoted” plans, click the link under the Plan Column on the Renewal Manager screen.
- You will see a detailed Renewal Summary of the group information, selected plan details, and rates as they compare to the previous year. This summary is designed to give you an overview of your group’s plans and help select the best renewal options.
- You may print the summary for your records by clicking the Print button at the top of your screen.
Run quotes

- Click the “View/Modify Quote” link under the Action column of the Renewal Manager screen.

- You will see the As-Is Plan Design and Option Configurator screen. This page shows the current plan design, what the plan will be if no changes are made (“As-Is” Plan), and allows you to make changes.
  - The configurator is pre-populated with the group’s current plan design. To make changes, select from the different options provided in the drop down menus.
  - Once you have made your changes, click the Recalculate button at the bottom of the configurator.
  - A chart containing the current rates for the selected plan, rates if the plan is renewed As-Is, and rates if the plan is changed will show at the bottom of the screen. A year to year percent of change comparison will also be calculated.
  - If you are satisfied with the plan, click the Save Quote button. Saving a quote will direct you back to the Renewal Manager screen.
  - If you choose to Select for Renew with Changes or Select for Renew As-Is, a Plan Design Selected confirmation page will appear. Clicking Confirm on this page will remove all previously saved quotes for this CSP and you will be directed to the Renewal Manager screen to continue the renewal process. If you click Cancel, you will be returned to the Renewal Manager screen with the plan saved as a quote.

- If you do not wish to continue with the quote, click the Cancel button to return to the Renewal Manager screen with no updates.
Submitting a renewal

- When you return to the Renewal Manager screen, your saved quote will be listed under the original As-Is CSP.

- You will be able to view high level plan summary information for comparison purposes for both the “As-Is” and “Quote” plan(s) or make further changes using the View/Modify Renewal option.

- When you are ready to submit the plan for renewal, select the button next to all the plans you wish to renew (either an As-Is or Quoted plan). If a group has more than one CSP you must include all of them when you submit the renewal or it will not be accepted.

- Confirm that you are authorized to act as a Benefits Administrator for the group. Then, click the Submit Online Renewal button at the bottom of the screen.

- Once the renewal has been submitted, IDEA will identify any issues – such as non-compliant changes – or proceed with updating the plan.
  - If IDEA identifies any issues you will be brought back to the Renewal Manager screen to make the necessary changes. These changes can be made by clicking the “View/Modify Quote” link.
  - If there are no issues with the renewal, IDEA will instantly implement the plan updates.

- If you do not wish to submit the renewal at this time, click the Cancel button.
Renewal Results

- When IDEA has finished updating the plan, the Renewal Results page will appear. This page will show the old and new CSPs, Renewal Status and Confirmation number.
  - Members will be moved from closed CSP codes to the new active CSP codes within 24-48 hours.
  - Renewals submitted on the day prior to the renewal date may result in a one-day disruption in Pharmacy Service.
  - From here, you may print the renewal summary, view the Summary of Coverage, or return to the Your Groups' Renewals page.

Updated Search Results

- If you search for a group after a renewal is submitted, the results page will show the updated CSP information and note if plans were “Renewed As-Is” or “Renewed with Changes.” From here you may View the Renewal, View/Send the Proposal, and View the Summary of Coverage.
- To make additional changes prior to the renewal date contact Group Services at groupservices@oxfordhealth.com or call 1-888-201-4216.