Broker Portal: SGOR Training Guide
Small Group Online Renewals
SGOR - Broker Access (Authenticated Access Only)
SGOR - Renewal Dashboard
Broker view of small business customers

Broker lands on the Small Business Renewal Dashboard where the groups are listed according to their renewal month.
SGOR – Renewal Options/Subscriber Roster

From the Renewal Options page where the Subscriber Roster displays the employees and their current medical plans, click on the blue Create Renewal Changes button to view and select Small Business portfolio plans at the group level.
SGOR – Plan Package Selection at the Group Level

By clicking on the +/- Add or Remove Plans blue button, you will be brought to the screen where you can select a plan package via radio button, eventually displaying a list of portfolio plans offered for selection during the Open Enrollment period.
SGOR – Plan Selection: Medical and Dental
SGOR - Plan Selection: Dental, Vision, Life

After selecting plans from each section (medical, dental, vision), click on the applicable blue Save Medical Selections, Save Dental Selections, Save Vision Selections, or Save Life Selections buttons.
After selecting plans at the group level from the previous screens, by clicking on the blue **Update Subscriber Roster** button at the bottom of the page, you will be brought to the Subscriber Roster screen where you select plans at the **Member level**.
SGOR - Quick Summary View & Subscriber Quote Summaries
(member level plans listed)

After completing the member level changes and clicking on Get Quotes button, you are brought to the Quick Summary screen where the renewal quotes are displayed in the Subscriber Roster table.
SGOR – Alternate/Custom Quote Summary

From this screen you can view the quoted monthly premium of the selected renewal plans.
Once you have reviewed the plan changes, you are brought to the screen where you can submit the renewal changes.

This is the section where the waiting period is selected from a dropdown list and where the broker provides an e-signature. The name entered must match the first and last name on the Broker’s profile and is case sensitive.

Hitting the Submit button will complete the renewal changes.
SGOR – Submitted Custom Quote & Confirmation of Renewal Submission

After submitting the plan renewal changes a confirmation number will be generated for reference.

You have the option to Print Page (the confirmation page) or simply navigate Back to Broker Dashboard to start the renewal for another small business client.