

# Steps to renewing a plan in BB – (to be done prior to the plan expiring)

1.) Search for the client that you are looking to renew in BB

2.) Scroll down to the plan section on the main page and click on 'renew'

Plans

History

Renew

Add

Plan Type	Plan Name	Plan Year	Carrier/Administrator	Policy Number	AMS Policy ID	Beginning Policy Status
<a href="#">Medical</a>	Untitled	10/01/2022 - 09/30/2023	Highmark BCBS (NEPA)	10574666	12419985	Renewed - Same Carrier

3.) The available plans will be listed that you can select from to renew. If there is more than one plan that you are renewing, you are able to select multiple plans to renew at the same time.

The screenshot shows the 'Plan Renewal' interface. At the top, there is a header 'Plan Renewal' with a blue icon. Below it, the 'Medical' section is active. A plan is selected, indicated by a checked checkbox: 'Untitled (Highmark BCBS (NEPA)) 10/01/22 - 09/30/23'. The form contains several fields: 'Beginning Plan Status of Renewed Plan:' with a dropdown menu set to 'New - AOR'; 'Release Renewed Plan to client portal:' with an unchecked checkbox; 'Copy Premium and Commission Information:' with an unchecked checkbox; and 'Ending Plan Status of Current Plan:' with a dropdown menu set to 'Select...'. At the bottom of the form, there are two buttons: 'Renew' and 'Cancel'. Below the form, there is a footer with copyright information: '© 2003–2023 Zywave, Inc. All rights reserved. Terms & Conditions | Privacy Statement | DMCA | Contact'.

4.) Select the Beginning status of the plan, update to what is applicable for the client: Renewed – Different Carrier or Renewed – Same Carrier

5.) Check the box to 'copy premium and commission information'

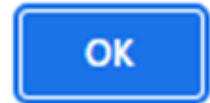
6.) Select the Ending status of the plan, update to what is applicable for the client: Renewed – Different Carrier or Renewed – Same Carrier

7.) Click renew

8.) You will see a pop up showing the plan has been renewed

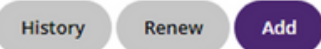
brokeragebuilder.com says

All plan information has been copied except for attachments.  
Please open these new plans and verify the commission and premium values.



9.) You will be taken back to the 'Info' tab where you will see the plan listed with the renewal dates.

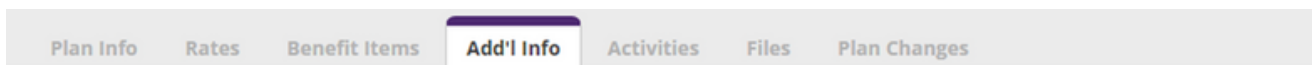
Plans



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<u>Medical</u>	Untitled	10/01/2022 - 09/30/2023	Highmark BCBS (NEPA)	10574666	12419985	Renewed - Same Carrier
<u>Medical</u>	Untitled	10/01/2023 - 09/30/2024	Highmark BCBS (NEPA)	10574666	13039422	Renewed - Same Carrier

10.) Now you have to add the files to the plan (rates, summary of benefits, important applicable plan documents).

11.) Click on the add'l information and be sure to list the new hire waiting period. You can add any other plan information, carrier rep/contact, etc under the notes section in this tab.



Additional Information



New Hire Waiting Period

Waiting Period	Description	
<input type="text" value="Select waiting period..."/>	<input type="text"/>	<input type="button" value="Add"/>