SBG Online Renewals – General Agents and Broker Access

General Agents and Brokers should use the process below to access the released renewal kits through the Broker Portal.

Step 1: General Agent/Brokers logs into the Broker Portal via the links on Healthnet.com or by navigating directly to broker.brokersecureportal.com/brokerconnect/login

Step 2: Choose desired "Commercial Group Broker/GA ID" from the drop-down list at the top right of your screen and click "Go" to activate a site wide filter for that entity.

Step 3: Once the page has refreshed, click on the "Sales & Quoting Resources" link in the top ribbon bar.

Step 4: On the next screen, click on the "Open Small Business Quoting Tools" in the bottom left corner.

Note: Pop-up blockers must be turned off for this link to work. If you receive the following error message, you will need to turn off the blockers in your web browser settings.

Step 5: You are now on the Quoting Dashboard page. From here you can use the Search field to find a specific employer by their Group Name (Case Name) or Policyholder ID (Case ID).

Or you can use the "Advanced Search" to use filters and find multiple groups within certain renewal periods. After clicking "Advanced Search", click on the "Activity Criteria" check box to see the filter options.

Activity Type = Renewals (SG)
Activity Status = All Activity Statuses
Renewal Period = All Renewal Periods
Effective Date = Desired Plan Effective Dates

Step 6: Once you have your search results, you can click on the "View" button to the right of each entry to see the Case Summary.
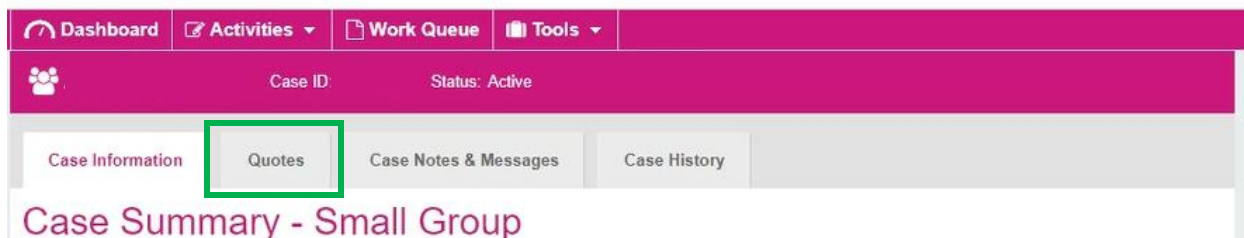

Case Summary - Small Group

Step 7: Once in the Summary view, you can click on the "Quotes" tab to find the renewal information.

Step 8: The approved renewals that have been released are listed as "RNQ" in the Type field and the Status = "Auto-Renewed".

Step 9: Click "View" to open the official renewal (or version 1) kits.
   Note: You will not see any proposed iterations within this view.

Optional: If you wish to make proposed changes for review, click the "Copy" button to create a duplicate which will be flagged as "RNA" which you can make suggested edits and review with your Account Manager.

IMPORTANT NOTE: Any changes made here (Plan, Group, Census, etc.) are for illustrative purposes only and do not constitute an official request. Any changes made here need to be communicated to your Account Manager directly.

Step 10: Click on the "View Original Renewal PDF" to view and download the renewal kit.

Step 11: To open the next group in your list, you will need to click the "Advance Search" link and refresh the search list. Your search criteria should be retained.