



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.

health net

Book of Business | Commission Statements | Eligibility, Status & Activity | Sales & Quoting Resources | Support Tools | My Account

Viewing For: CONNECT INSURANCE SERVICES, LLC, AMWINS - 2... | CA - Health Net Commercial Group () | GO

Sales & Quoting Resources

Quoting Tools | Forms and Brochures

Small Business Group (SBG) Quoting Tools

Quoting Tools Features
With our Small Business Quoting Tools, you can:

- View, compare, and quote a full range of health products, including Medical, Dental, Vision, and Life.
- Generate proposals that you can email directly to your clients, along with support documentation and personalized messages.

Click below to open the quoting tools in a new window.

Important: Confirm Your Broker ID and State Before Proceeding
Before accessing our Broker Tools, please verify that you have selected the correct Broker ID and state.

ⓘ Your current Broker ID is AR758 and your state is CA.
To change this setting, select a different Broker ID at the top of this page.

Open Small Business Quoting Tools

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.

Pop-up blocked

test-support.brokersecureportal.com/brokerconnect/quotingTools

test-support.brokersecureportal.com

Connection is secure

Cookies 22 in use

Site settings

Pop-ups and redirects Allow



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).

Advanced Search

Case Name

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.

Search Criteria

Case Criteria

Case Name:

Case ID:

Broker ID:

Producer Last Name:

Agency Name:

Additional Criteria

Advanced Case Criteria

Activity Criteria Search for cases based on activity information.

You must select a type of activity to continue with activity search.

* Activity Type:

Activity ID:

Activity Status:

Renewal Period:

Effective Date: To

Create Date: To

Submitted to Reviewer Date: To

Accepted Date: To

Line of Coverage:

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

Search

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.

Dashboard Activities Work Queue Tools

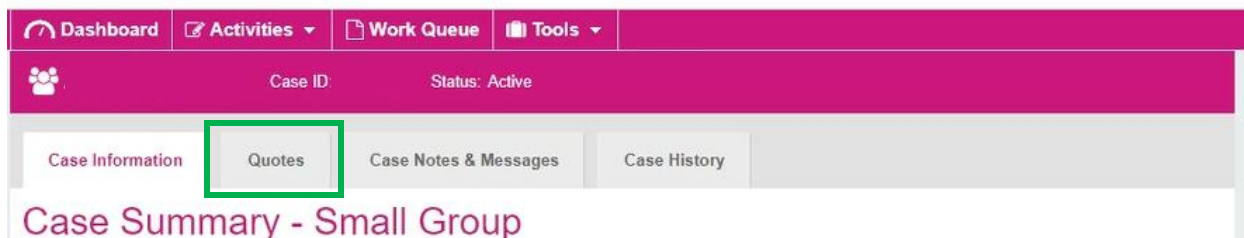
Case ID: Status: Active

Case Information Quotes Case Notes & Messages Case History

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”.

Renewal(s)

ID	Copied From	Type	Renewal Period	Date Created	Created By	Effective Date	Status	Renewal Notice Quote		
1886102-01	N/A	RNQ	CA2023_02	11/09/2022	System, Internal	02/01/2023	Auto-Renewed	✓	View	Copy

Step 9: Click “View” to open the official renewal (or version 1) kits.

Note: You will not see any proposed iterations within this view.

Renewal(s)

ID	Copied From	Type	Renewal Period	Date Created	Created By	Effective Date	Status	Renewal Notice Quote	View	Copy
1886102-01	N/A	RNQ	CA2023_02	11/09/2022	System, Internal	02/01/2023	Auto-Renewed	✓	View	Copy

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.

What's Next?

Renewal Letter: Standard

Helpful links:

- [View Quote](#) - Read only view of quote details
- [View all renewal quotes](#) - See all renewal quotes made for this group
- [View Original Renewal PDF](#) - Download the original Renewal PDF
- [Add a Note / Message](#) - Add a note/message to the renewal
- [Quote History](#) - See a history of the renewal
- [Attachments](#) - Add an attachment to the renewal

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.