

Step #1

From Producer Toolbox Home Page, select the Small Group tab

The screenshot shows the top navigation bar with the following tabs: Home, Incoming Business, Current Business, Reports, Commissions, Sales & Training, and Agent Connect. Below the navigation bar is the "DIRECT SALES Home Page" header, which includes a "Last login: 04:08 PM 02/13/2014" timestamp and a paragraph of instructions for users. The main content area features two tabs: "Individual" and "Small Group", with the "Small Group" tab circled in red. Below the tabs is a grid of six functional areas: Incoming Business, Current Business, Reports Download Center, Commissions, Sales & Training, and AgentConnect. To the right of the main content area is a sidebar titled "Online Resources" containing several hyperlinks.

Home Incoming Business Current Business Reports Commissions Sales & Training Agent Connect

DIRECT SALES Home Page Last login: 04:08 PM 02/13/2014

For new and ACA-compliant plans - use the navigation bar above or select the "Individual" or "Small Group" tabs below to view or work on your accounts. For Large Group, Medicare, non-ACA compliant plans (grandfathered) Individual and Small group plans - use the Legacy portal links further down on this page. Please access your Legacy Portal by clicking the link(s) below to quote Individual products for effective dates in 2013.

Individual **Small Group**

- Incoming Business**
 - Create a new quote/comparison
 - Resume saved quote
 - View submitted/in progress applications
 - Check status of submitted application
 - Start/complete an online application
- Current Business**
 - View client list/review plan details
 - View client billing history
- Reports Download Center**
 - Create & download reports
 - View report history
- Commissions**
 - View & download previous months commissions
- Sales & Training**
 - Order/download sales materials
 - View product information
 - Policies & procedures
 - Health Care Reform toolkit
- AgentConnect**
 - Create your personal AgentConnect web page

Online Resources

- [Find a Doctor \(Dentist, Pharmacy or Hospital\)](#)
- [Individual Dental Prime Online Store](#)
- [Dental Prime/Complete Small Group Quoting Tool](#)
- [Critical Illness and Accident](#)
- [Prescription Drug Lists](#)
- [Health Care Reform Toolkit](#)
- [Health Care Reform Website](#)
- [Healthcare.gov](#)
- [Producer Online News](#)

Step #2

Select the Current Business tab

The screenshot shows a close-up of the navigation bar. The tabs are: Home, Incoming Business, Current Business, Reports, and Sales & Training. The "Current Business" tab is circled in red. Below the navigation bar, the sub-tabs for "Current Business" are visible: Clients, Billing, and Rate Actions & Renewals.

Home Incoming Business **Current Business** Reports Sales & Training

Clients Billing Rate Actions & Renewals

Step #3

Select the Rate Actions & Renewals tab



Current Business - Rate Actions & Renewals

View the rate actions and renewals for your Book of Business

Small Group

Small Group Renewals

Enter a group's name below to quickly find its renewal [Renew Group Manually](#)

Group Name:

Group Number: Agency TIN: Agent TIN: Select a State: Exchange Status: Sales Rep:

Select Renewal Date Range: to Sales Rep ID: Writing Agent: Select Ordering Options: