# **SMART guide to ACA Renewals**

This user guide is intended to be informational only and to provide instructions on how to access and download a copy of renewals in SMART.

### **Accessing SMART**

You can access SMART, the Small Group quoting and renewal tool, by logging into <u>Producer World</u> and looking under quoting and renewal tools.

## Searching for a renewal in SMART

Search for the group by either Group Name or PSUID/Group ID number by selecting it from the drop-down box. Enter the information and hit enter or select the magnifying glass. The PSUID/group ID is going to be the account number for the group, not the control number.

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# Downloading/Saving your Proposal

To generate the renewal proposal for the group, select "Proposal." You'll see a message telling you your proposal is being generated.

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Work Queue Add New Business	Preferences Reports 🗸 Proposal Status User Guide
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Quote Summary Quote ID : 8147641 ~	Group Summary Group Name : 235813 15 01 PSUID/Group ID: 8914548252 Effective Date : 03/01/2015 Broker/Firm : QASetonelBrokertwoF QASetonelBr QRS Tracking # : QRS2406361 Renewal Date : 03/01/2016 GA Name : on
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To print a PDF of the proposal, select "Proposal Status" at the top of the screen. Then select the link for "Download."

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		Privacy Statement   Legal	Statement   Info Copyright® 2	rmation Practice 003-2015 Aetna	s Member Disclosure			

## To pull all your renewals

- 1. Select Work Queue at the top of the screen
- 2. This will take you to the Group Search and display all your renewals groups. If the renewal is available, the Group Name will be a hyperlink.
- 3. Select the Group Name to access the record.

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### Renewal

- Assign renewals to Internal User
- Update the renewal schedule Add a new group manually
- Maintain notes related to groups
   Search group renewals based on IU, GA, Brokers or specific group
- Review and/or update group, agent and census information
   Modify quotes to include specific plans
- · Compare the cost and benefits of various plans within a quote
- Distribute proposals to all users
  Renew a policy on behalf of the group
- Terminate a group
- Print a quote
- Print the proposal
  Print the Case Sheet

Work Queue A	dd New Business	Preferences Proposal/Downlo	ad Status User Guide			
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#### Work Queue

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	6/1/2021	R		QR55648348	32	Group Install in Progress	Final Rates Sold	Quotes and Proposals
Group Names	6/1/2021	N		QR55674010	8	Group Install in Progress	Group Install Complete	Quotes and Proposals
will show here	6/1/2021	R	_	QR55648936	2	Group Install in Progress	ID Card Generated	Quotes and Proposals

# To pull all your renewals by renewal month

- 1. Select advanced search
- 2. Group type: renewal
- 3. Group effective date: Put in the renewal month you're searching for
- 4. Default state: If you have cases in different states, you may search default group state

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Work Queue Add New Business Prefer	rences Proposal/Download Status	User Guide		
		PSUID/Group ID 🗸 search	C Advanced	Search
New Business				
Enter a Prospect (new group) into the system Set up a case for a new group Run quotes for a new group Search based on IU, GA, Broker or specific group Maintain notes related to a group Submit a case to underwriting Generate and distribute a Quote package Generate and distribute a Final Rates package Accept a Final Rates package on behalf of a group				
Assign renewals to Internal User     Update the renewal schedule     Add a new group manually     Maintain notes related to groups     Search group renewals based on IU, GA, Brokers or     Review and/or update group, agent and census info     Modify quotes to include specific plans     Compare the cost and benefits of various plans with     Distribute proposals to all users     Renew a policy on behalf of the group     Terminate a group     Print the proposal     Print the Case Sheet	specific group rmation in a quote <b>the contract of the contrac</b>	e ! (Broker)		👸 🕐 Back to Producer World
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**Group Names** 

will show here

6/1/2021

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QR55674010

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Group Install In Progress

Group Install in Progress

Group Install Complete

ID Card Generated