

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 [Producer World](#) 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.

PSUID/Group ID** :

Quote ID** :

Internal Tracking #** :

Group Name** :

Group Type :

Default State :

Broker/Firm Name :

Product Category :

Group Effective Date : From : To :

Quote Status :

Case Status :

Region/Territory :

Clear Search

Work Queue

1 records matched your selection.

Group	Group Effective	Group Type	Group ID	QRS Internal Tracking Number	# Enrollees	Quote Status	Case Status	Action
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Aetna is the brand name used for products and services provided by one or more of the Aetna group of companies, including Aetna Life Insurance Company and its affiliates (Aetna).

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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.

The screenshot displays the Aetna web portal interface. At the top, the Aetna logo and navigation menu are visible. The main content area is titled "Rates & Benefits" and contains a "Quote Summary" and a "Group Summary". A modal message box is overlaid on the page, indicating that the proposal is being generated. Below the summary, there are buttons for "Send Proposal", "Proposal", "Quote", and "Save". The main content area shows a table of medical options with their respective total premiums and costs.

Plan Name	Cost
FL Aetna Gold OAMC...	\$1,123.76
Current Premium	\$0.00
FL Aetna Silver Inde...	\$3,268.87
FL Aetna Gold HNOp...	\$2,709.52
FL Aetna Gold HNOp...	\$2,565.77

To print a PDF of the proposal, select “Proposal Status” at the top of the screen. Then select the link for “Download.”

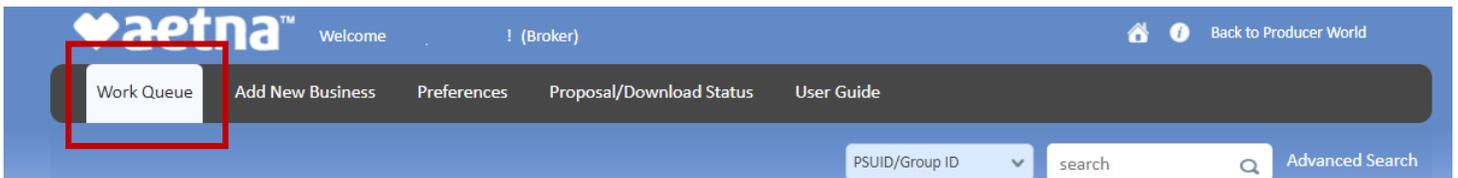
The screenshot displays the Aetna web portal interface for the "Proposal Generation Status" page. The page features a navigation menu at the top and a search bar. A "Refresh" button is prominently displayed. Below the search bar, there is a table with columns for "Print Request ID", "Print Request Status", "Print Request Date", "Download", "Group Type", "Group ID", "Group Name", "Quote ID", and "Delivery Type". A "Download" link is highlighted in red. The page also includes a footer with links for "Privacy Statement", "Legal Statement", "Information Practices", and "Member Disclosure".

Print Request ID	Print Request Status	Print Request Date	Download	Group Type	Group ID	Group Name	Quote ID	Delivery Type
5768085	Ready for view	6/3/2015 9:51:02 AM	Download	Renewal			12210064	Print

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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.

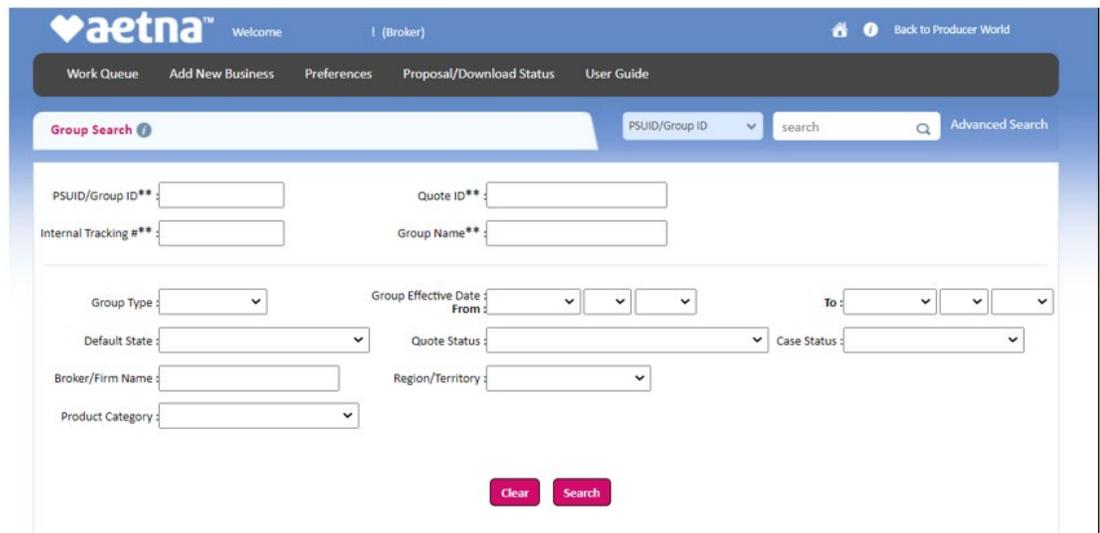


New Business

- 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

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

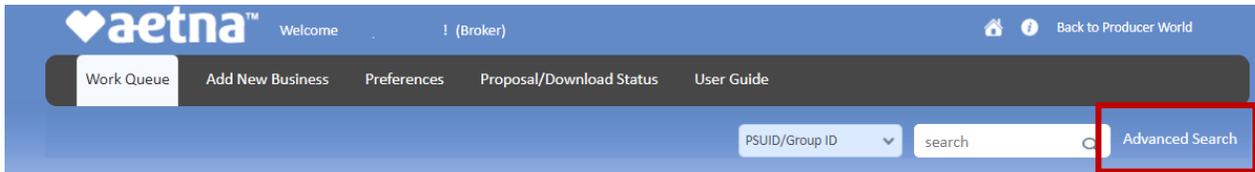
1000 records matched your selection.

Group	Group Effective Date	Group Type	Group ID	QBS Internal Tracking Number	# Enrollees	Quote Status	Case Status	Action
Group Names will show here	6/1/2021	R	[REDACTED]	QR55648348	32	Group Install in Progress	Final Rates Solid	Quotes and Proposals
	6/1/2021	N	[REDACTED]	QR55674010	8	Group Install in Progress	Group Install Complete	Quotes and Proposals
	6/1/2021	R	[REDACTED]	QR55648996	2	Group Install in Progress	ID Card Generated	Quotes and Proposals

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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

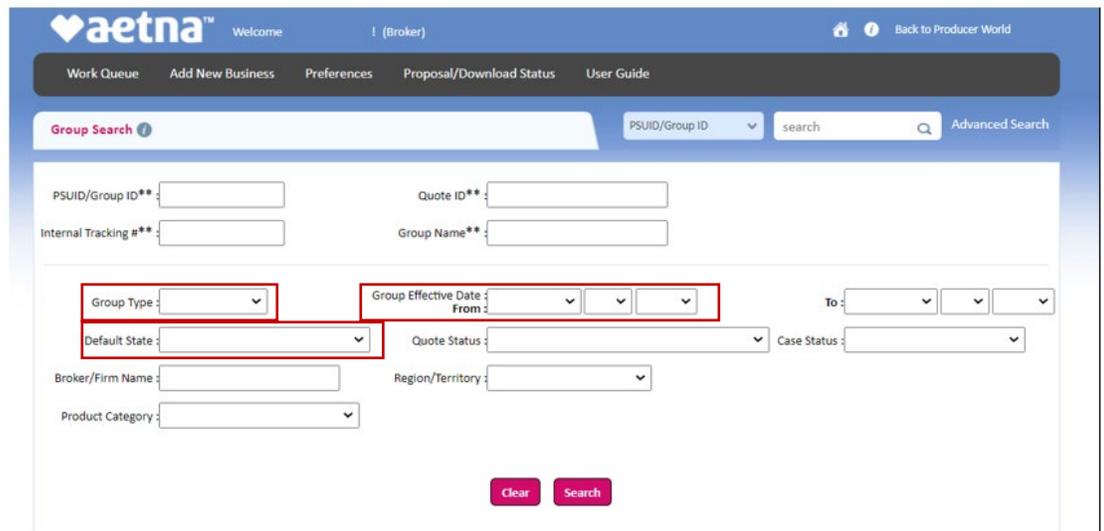


New Business

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Work Queue

1000 records matched your selection.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

Group	Group Effective Date	Group Type	Group ID	ORS Internal Tracking Number	# Enrollees	Quote Status	Case Status	Action
Group Names will show here								
	6/1/2021	R	██████	QR55648348	32	Group Install in Progress	Final Rates Sold	Quotes and Proposals
	6/1/2021	N	██████	QR55674010	8	Group Install in Progress	Group Install Complete	Quotes and Proposals
	6/1/2021	R	██████	QR55648936	2	Group Install in Progress	ID Card Generated	Quotes and Proposals