1. Sign In to InTouch

Sign in to InTouch for Agents at InTouch.PacificSource.com/agents to access the small group renewal system. If you don’t yet have an account, click the “Sign Up for an Account” link on the sign-in page.

2. The Groups Section

From the Groups dropdown menu, select “PacificSource Group Renewal.”

3. Renewals

You’ll see a list of your small group renewals sorted by their renewal dates. Those ready to renew will say “Available to Renew.” Click on a group to see details for the current renewal option. (Note: Group names and numbers have been blocked out in the illustration below.)
4. Group Renewal Details
Click on a group to see renewal details and access documents. (Note: The group name and number have been blocked out in the illustration below.)

5. Change Plan / Eligibility
Click on Change Plan / Eligibility to compare and change options. Click on Change Plan to see a list of available plans for this client.
Compare plans.

Compare current and selected plans. To make the change, click the Next button. (Note: The group name and number have been blocked out in the illustration below.)
Review the Renewal Confirmation Form. If everything looks correct, click the Renew As Is button. (Note: The group name and number have been blocked out in the illustration below.)

The Renewal Confirmation Form will be submitted to PacificSource through the online renewal system. (Note: The group name and number have been blocked out in the illustration below.)

6. Questions?

If you have questions about the online renewal system or renewals, please contact your sales representative.