

eBroker Portal
View Sentara Individual & Family Plans
Customer Information

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Purpose

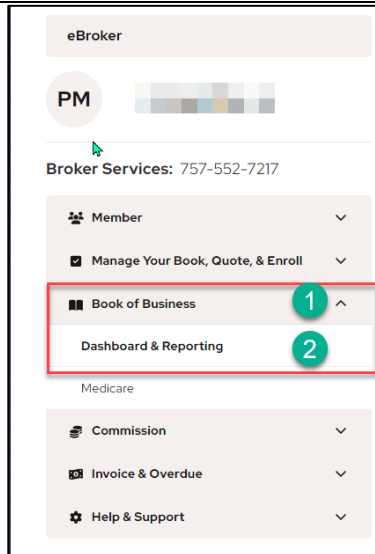
This guide provides an overview of how to view Sentara Individual & Family Plans customer information in the Broker Portal for Broker Book of Business and Manage Your Book, Quote, & Enroll. creating alerts

Broker Book of Business – Dashboard & Reporting

This link provides a dashboard and high level view of customer information.

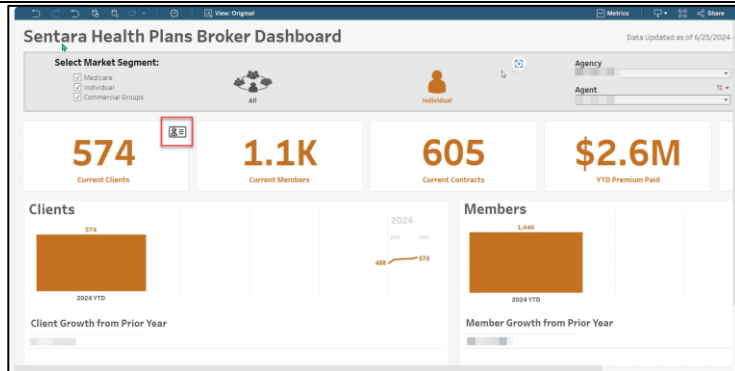
Dashboard & Reporting:

To view your book of business dashboard, expand the *Book of Business* and click the *Dashboard & Reporting* link.



The Sentara Health Plans Broker Dashboard is displayed:

To view a Current Client List, click the *ID icon* located in the *Current Clients* Box on the dashboard.

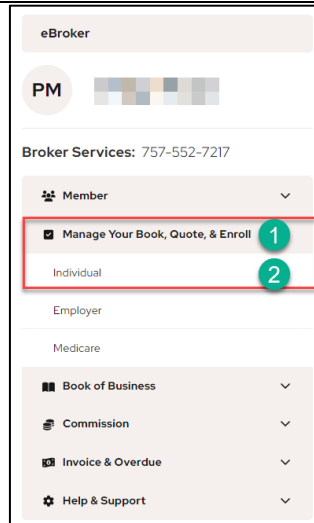


Manage Your Book, Quote, & Enroll

This link provides detailed customer activity and dependent information, including a Summary of Benefits.

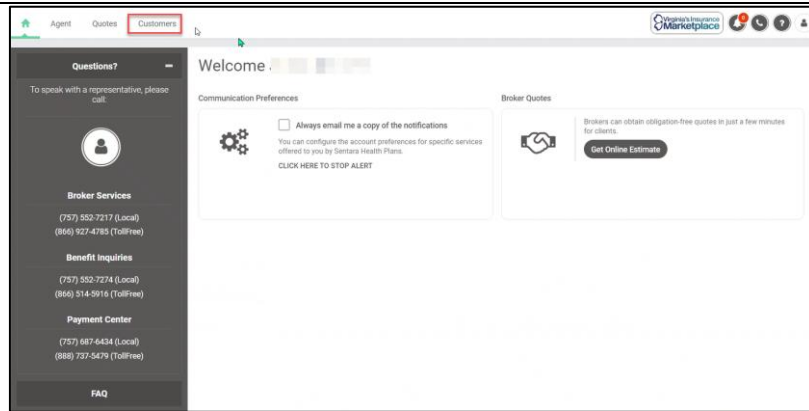
Manage Your Book, Quote, & Enroll:

To view details about your book of business click on *Manage Your Book, Quote, & Enroll* and select the *Individual* link.



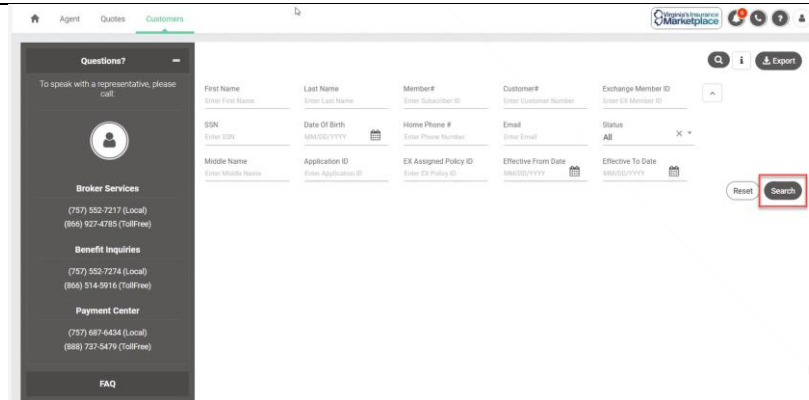
The dashboard displays:

To view customer details, click on *Customers* listed at the top of the screen.



Focused Search:

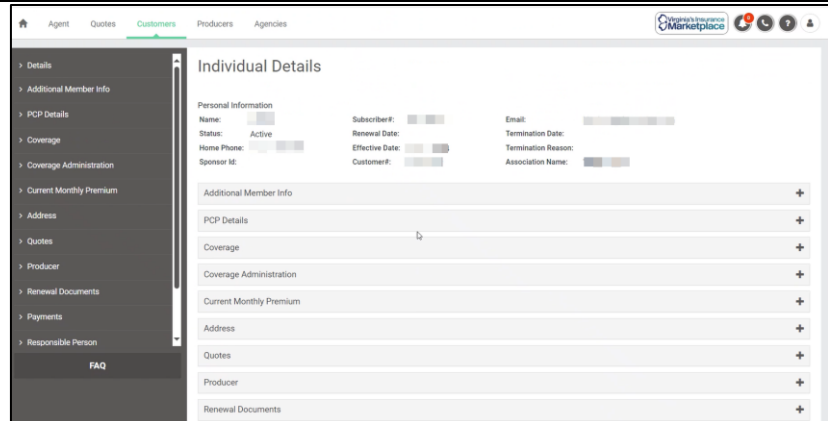
To search using specific criteria enter the information in the appropriate field and click *Search*.



Individual Details:

Click the plus (+) button to expand the section and view additional individual details listed under the Personal Information such as:

- Additional Member Info
- PCP Details*
- Coverage
- Coverage Administration
- Current Monthly Premium
- Address*
- Quotes
- Producer
- Renewal Documents
- Payments
- Responsible Person
- Notes
- Documents

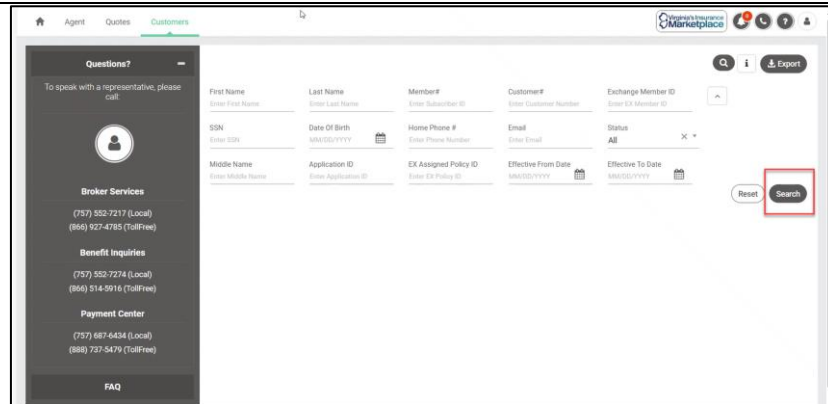


**Note: To change Member demographics or the PCP contact your Sales Representative.*

To view a list of Subscribers:

Leave the top section blank and click the **Search** button located under the criteria fields.

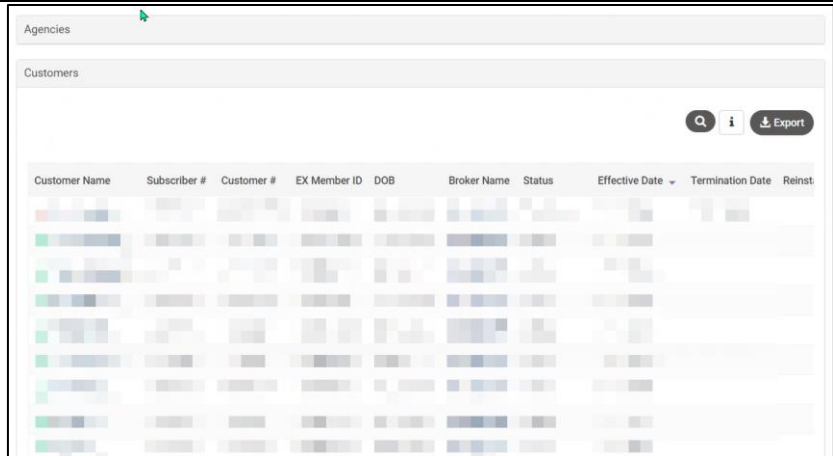
Note: the list only includes subscribers. To view the dependent information, please see the process detailed below.



Customer/Subscriber List:

The search displays a list of all individual subscribers, and includes:

- Customer Name
- Subscriber #
- Customer #
- EX Member ID
- DOB
- Broker Name
- Status
- Effective Date
- Termination Date
- Reinstate Date



To View Dependents and their Member ID Number:

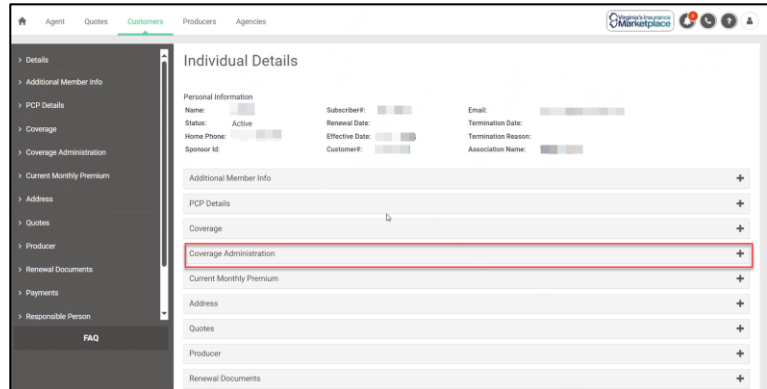
Search for the Subscriber.

1. Under the Subscriber's Individual Details, expand the *Coverage Administration* section.
2. Click on the most recent *Plan Name* based on the coverage effective date.
3. The *Coverage Details* page displays and includes the *Covered Members* Information.

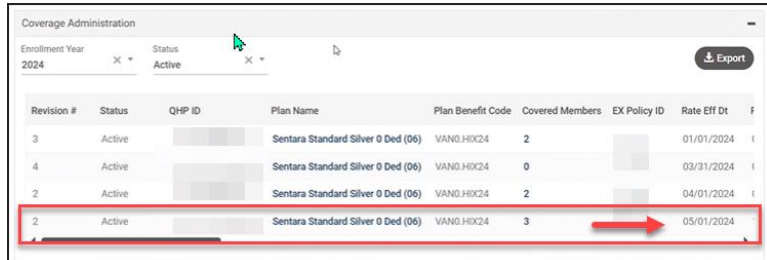
Summary of Benefits:

- The bottom of the *Coverage Details* page includes a button to view the Summary of Benefits.

1.



2.



Revision #	Status	QHP ID	Plan Name	Plan Benefit Code	Covered Members	EX Policy ID	Rate Eff Dt
3	Active		Sentara Standard Silver 0 Ded (06)	VAND.HIX24	2		01/01/2024
4	Active		Sentara Standard Silver 0 Ded (06)	VAND.HIX24	0		03/31/2024
2	Active		Sentara Standard Silver 0 Ded (06)	VAND.HIX24	2		04/01/2024
2	Active		Sentara Standard Silver 0 Ded (06)	VAND.HIX24	3		05/01/2024

3.

Coverage Details

Subscriber Details
 Name: [Redacted] Date Of Birth: [Redacted] Gender: Female

Plan Details
 Sentara Standard Silver 0 Ded (06) \$0.00

Covered Members

Member Name	SSN	DOB	Status	Relationship	Member ID	Effective Date	Termination Date	Rate
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Current Monthly Premium

Total Premium	APTC	Total Responsible	Interface Status	Transmission Date
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Terminated Customers:

To filter the list and view the terminated customers, click the focused search button and select *Terminated* from the drop down list available under the *Status* field. Enter the *Effective From Date* and *Effective To Date* criteria.

Customers

Search filters: First Name, Last Name, Member #, Customer #, Exchange Member ID, SSN, Date of Birth, Home Phone #, Email, Middle Name, Application ID, EX Assigned Policy ID, Effective From Date.

Status Filter: Terminated (Selected)

Customer Name	Subscriber #	Customer #	EX Member ID	DOB	Broker Name	Status	Termination Date	Reinst
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Terminated	01/01/2024	03/31/2024

Export Lists:

To export a list to Excel, click the Export button and follow the prompts.

Coverage Administration

Enrollment Year: 2024 Status: Active

Export (Redacted)

Revision #	Status	QHP ID	Plan Name	Plan Benefit Code	Covered Members	EX Policy ID	Rate Eff Dt	F
3	Active	[Redacted]	Sentara Standard Silver 0 Ded (06)	VAND.HGX24	2	[Redacted]	01/01/2024	[Redacted]
4	Active	[Redacted]	Sentara Standard Silver 0 Ded (06)	VAND.HGX24	0	[Redacted]	03/31/2024	[Redacted]
2	Active	[Redacted]	Sentara Standard Silver 0 Ded (06)	VAND.HGX24	2	[Redacted]	04/01/2024	[Redacted]
2	Active	[Redacted]	Sentara Standard Silver 0 Ded (06)	VAND.HGX24	3	[Redacted]	05/01/2024	[Redacted]

If you have any questions, please contact your Sentara Health Plans representative.