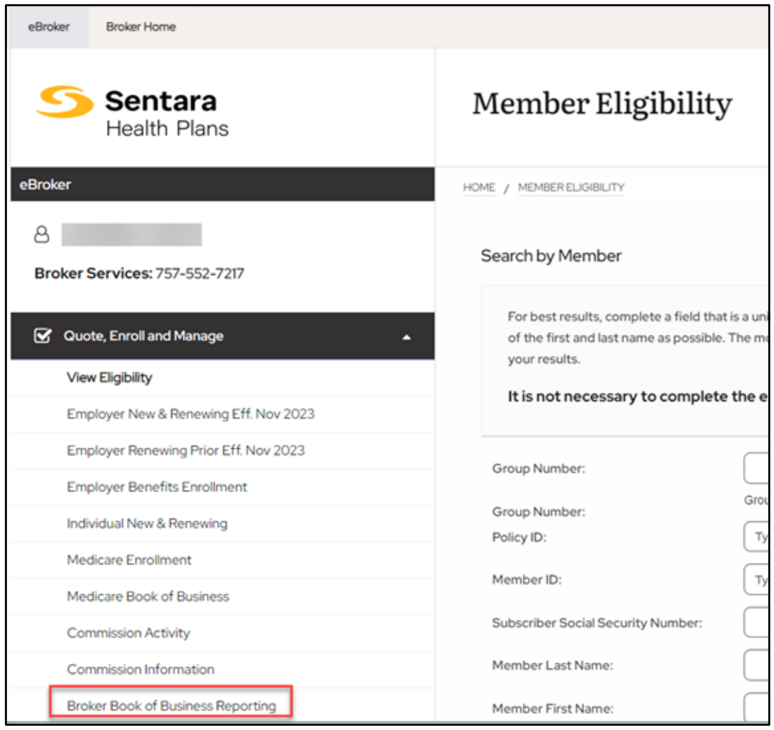
Purpose: Outline the functionality available to Brokers when accessing their Broker Book of Business Reporting in Tableau.

<table>
<tr>
<td>After you login, the Sentara Health Plans landing page displays. Under the Quote, Enroll and Manage Section, click Broker Book of Business Reporting.

Note: This is updated monthly on or around the 12th of the month.</td>
<td>
</td>
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<tr>
<td>You are prompted to sign in again and authenticate using Duo.</td>
<td></td>
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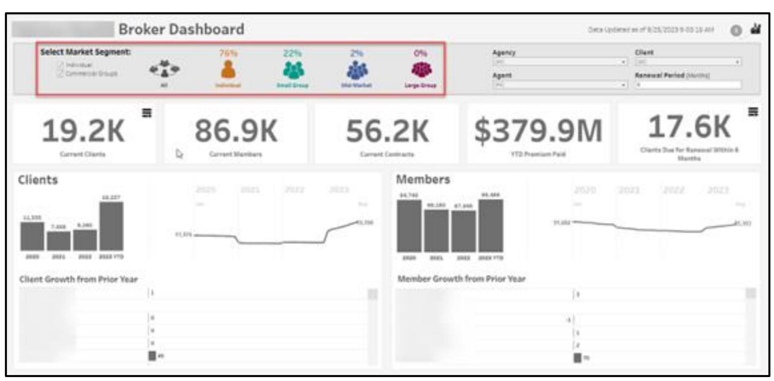
<tr>
<td>The Broker Book of Business Reporting Dashboard appears.
Your Dashboard provides a summary and trend of clients and members that can be filtered by Market Segment, including Individual and Commercial Groups. Each group has a corresponding color and icon.

Note: Medicare business is currently not visible.</td>
<td>
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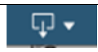
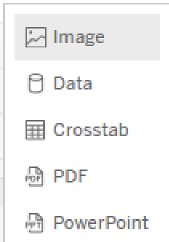
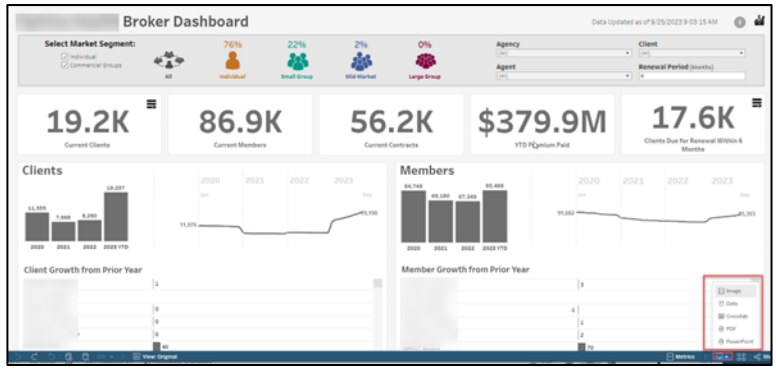
In the different sections throughout the **Book of Business**, you have the capability to scroll down to see all the available information in that section. Click on the faint gray square to the right of the data and pull it down to see additional data.	
You can decide what specifically you want to see in your **Book of Business** by choosing the desired group. For example: If you click on **Individual**, then information populates regarding individuals.	
You can use the features on the bottom blue ribbon. In order, they are: **Undo My Last Action** **Redo My Last Action** **Reset View** **Refresh Data in This View** **Pause Data Queries While Applying Actions** **View Original** **Download** **Full Screen**	

Click on this  icon on the bottom blue ribbon to choose a format to download. A pop-up window will open with formats to choose from. Click on the desired format:

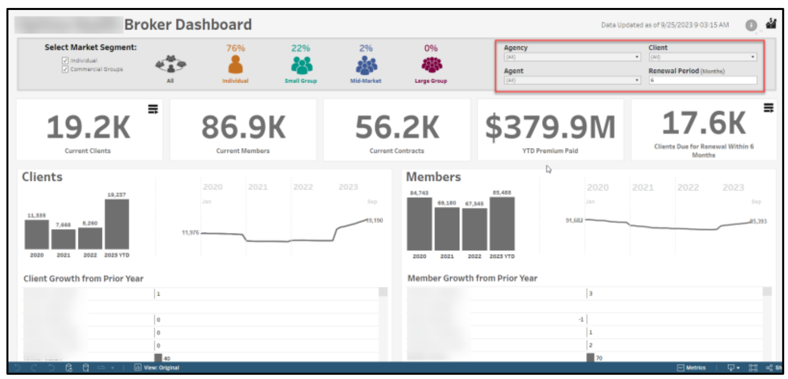


Note: **Crosstab** is the same as Excel.

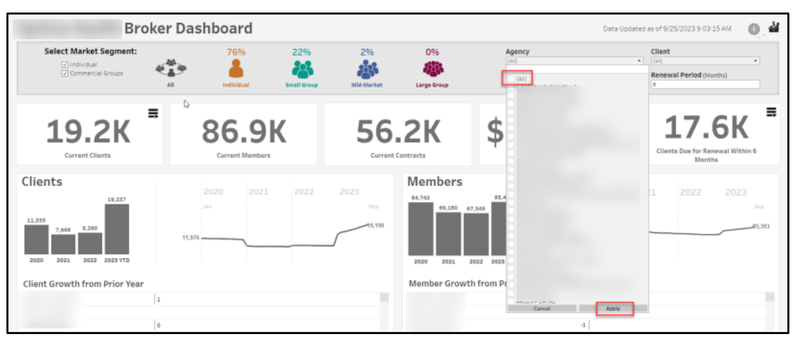


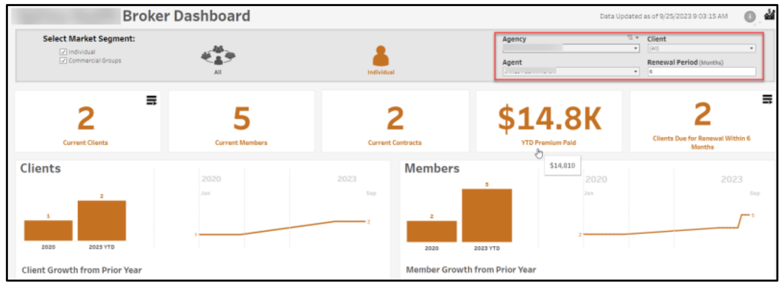
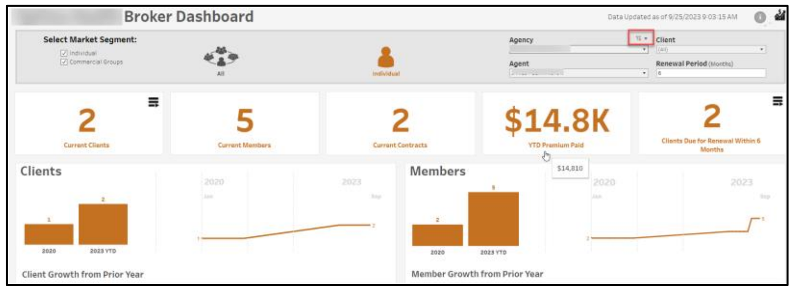
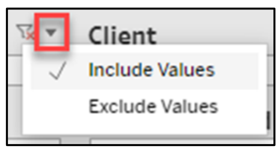
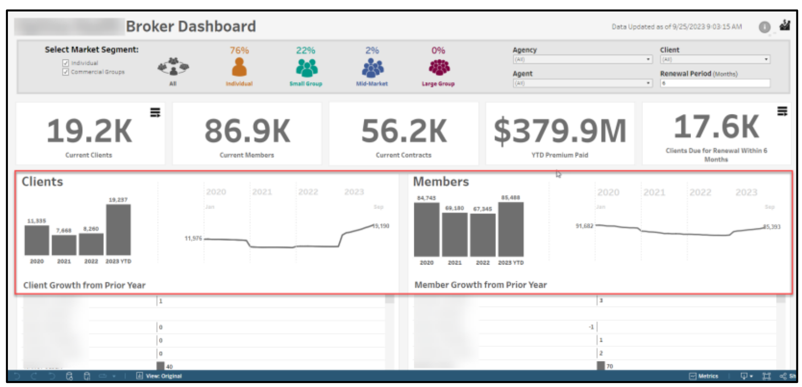
You can sort by **Agency, Agent, Client, and Renewal Period** in the top right-hand corner by clicking on the drop-down menu arrow underneath each category type to drill down to specific details.

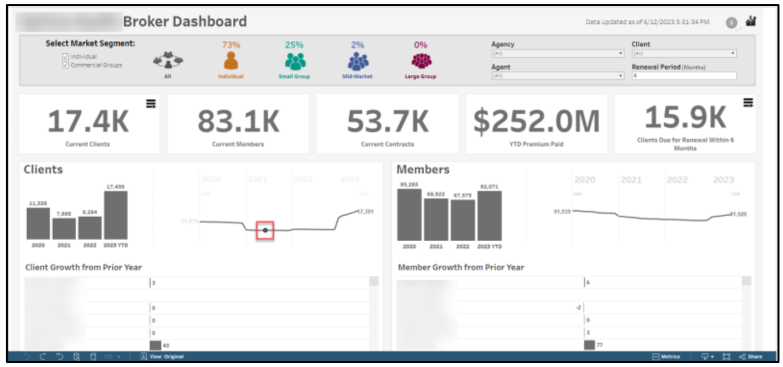
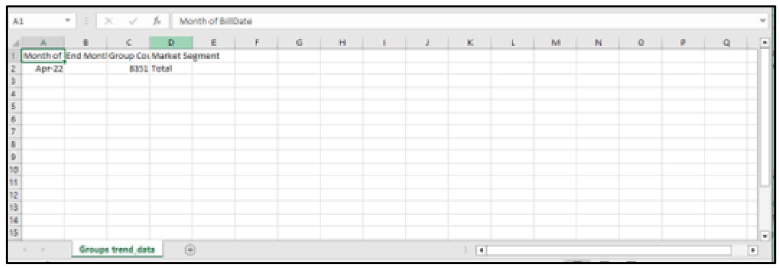
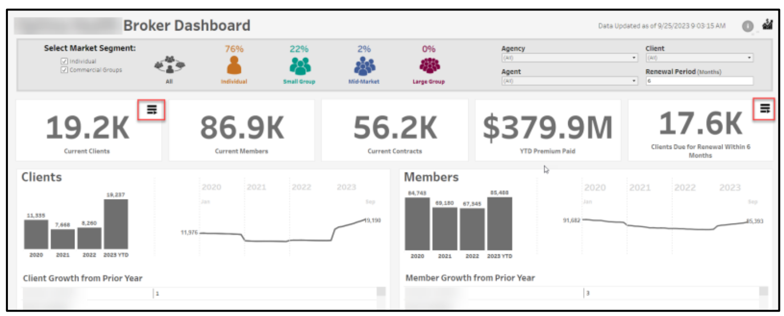
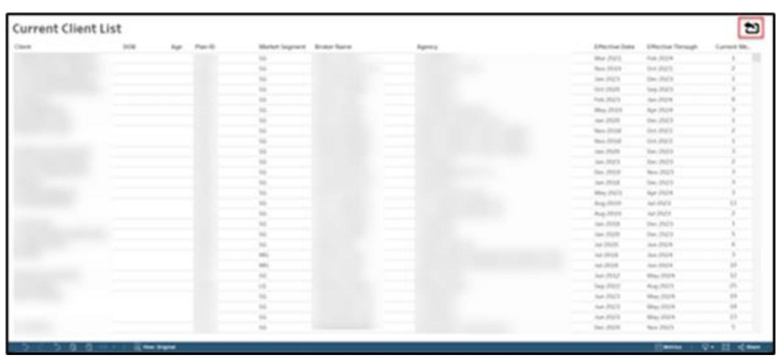
Note: You can view your current Clients by **Renewal Period**. The default is 6 months but can be changed to any value by changing the timeframe in the **Renewal Period** field.



Once you click the down arrow in the category box, unclick **All**. Then click the **Agency** you want and click **Apply**.

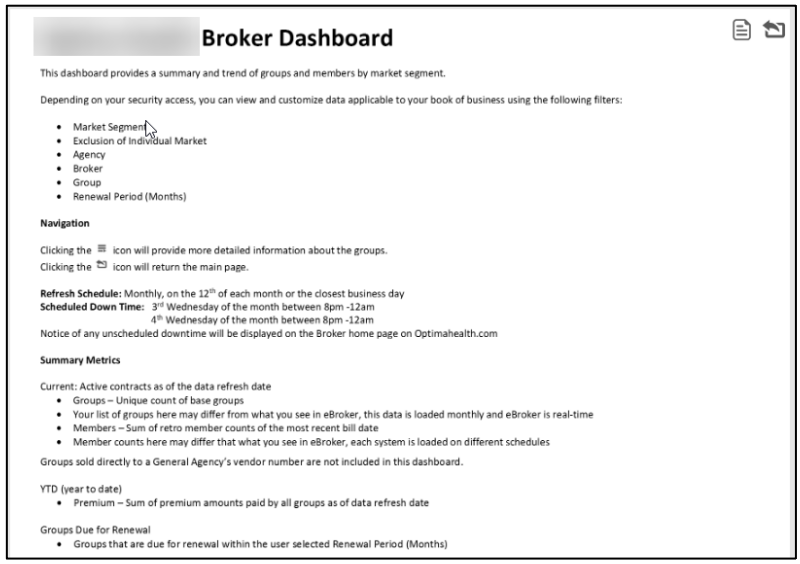


The information for the selected **Agency** is displayed. Each category in the top right corner functions the same.	
The **Un-filter** icon removes any filters so that all values are shown.	
Click on the down arrow beside the **Un-filter** icon to choose from a pop-up window allowing you to include or exclude values.	
Total **Client** and **Member** growth from **Prior Year** display in a line graph.	

When you click anywhere on the line graph, it displays the date and total for that specific point.	
When you click on **Download**, an Excel doc is created and displays.	
When you see the icon, it means that there is data behind it.	
After you click on the icon, a new browser window will open with all the detailed data associated with that category. Remember the features on the bottom blue ribbon mentioned previously, which allow you to share, download, etc. Click on the icon, to return to the main **Dashboard**.	

Click on this icon to go to the **Report Specifications.**

The **Report Specifications** doc displays, providing information about the different features of the **Dashboard**.



Click on this icon to go to the **Reference (User) Guide**.

Click this icon to return to the main **Dashboard**.

Click this icon to go to the **Commissions Dashboard**.

For information about features of the **Commissions Dashboard**, please see the document: Instructions for Brokers to Access Commission Activity.