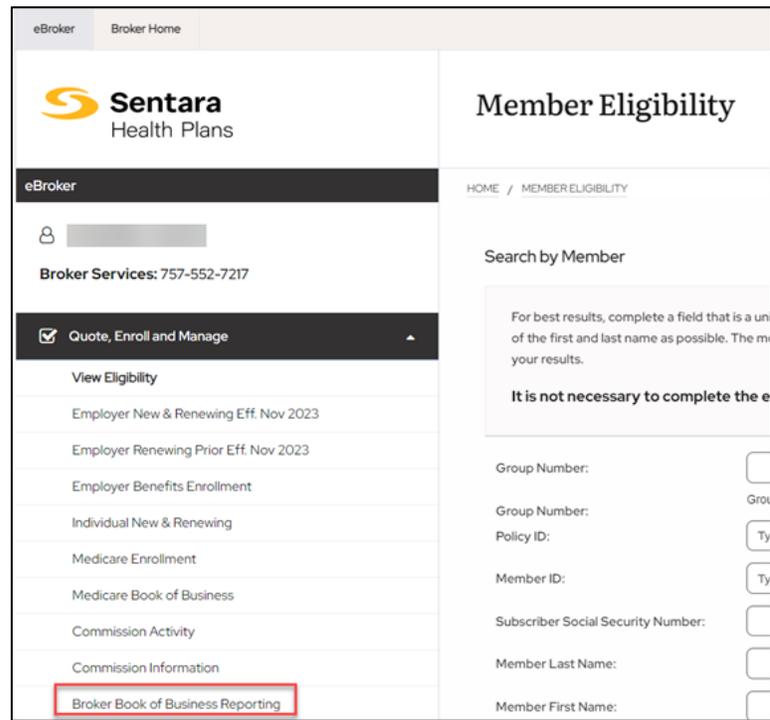


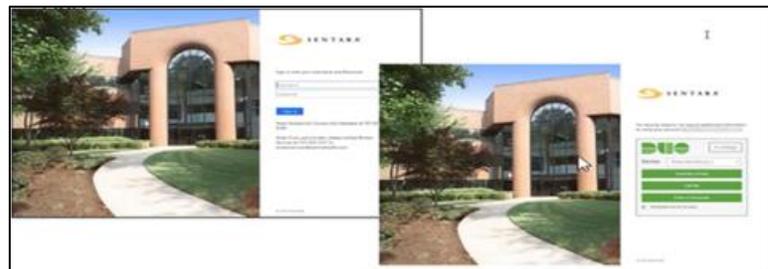
Purpose: Outline the functionality available to Brokers when accessing their Broker Book of Business Reporting in Tableau.

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.



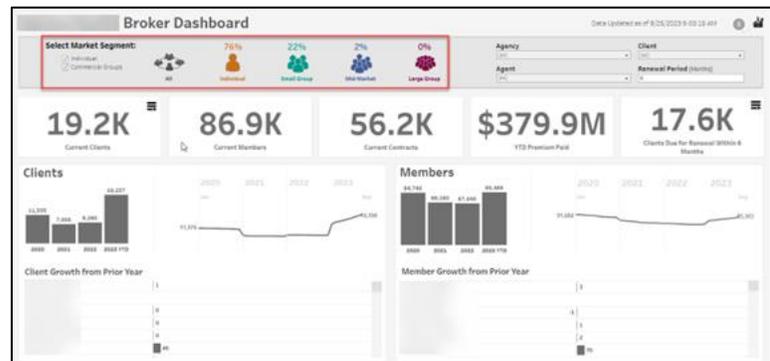
You are prompted to sign in again and authenticate using Duo.



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.



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.

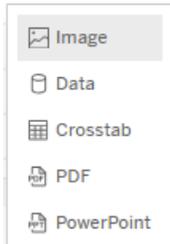


You can use the features on the bottom blue ribbon. In order, they are:

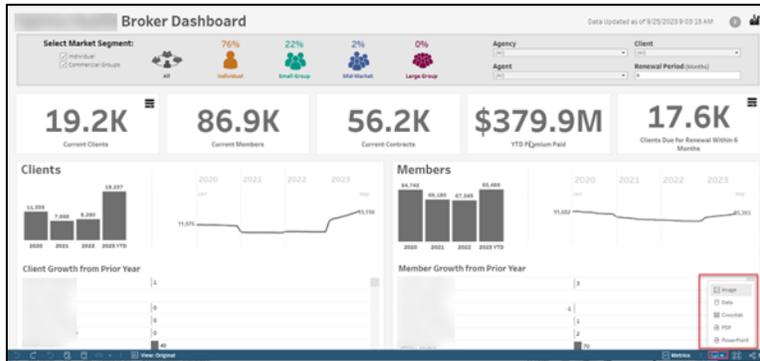
- Undo My Last Action**
- Redo My Last Action**
- Reset View**
- Refresh Data in This View**
- Pause Data Queries While Applying Actions**
- View Original**
- Download**
- Full Screen**



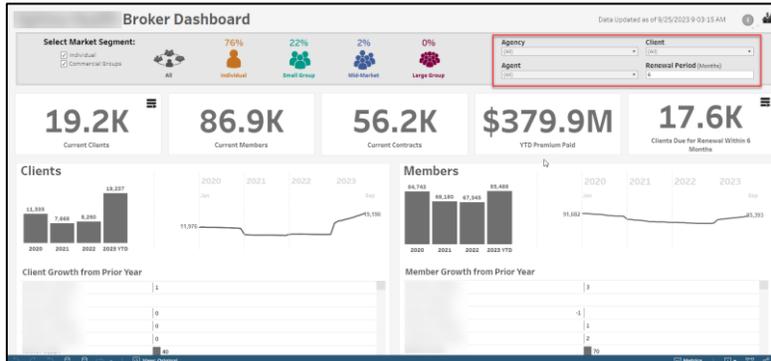
Click on this  icon on the bottom blue ribbon to choose a format to download. A pop-up window will open with formats to choose from. Click on the desired format:



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

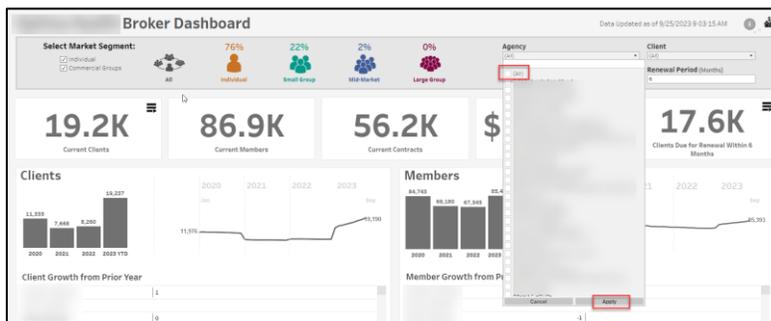


You can sort by **Agency, Agent, Client, and Renewal Period** in the top right-hand corner by clicking on the drop-down menu arrow underneath each category type to drill down to specific details.



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.

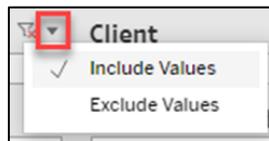
Each category in the top right corner functions the same.



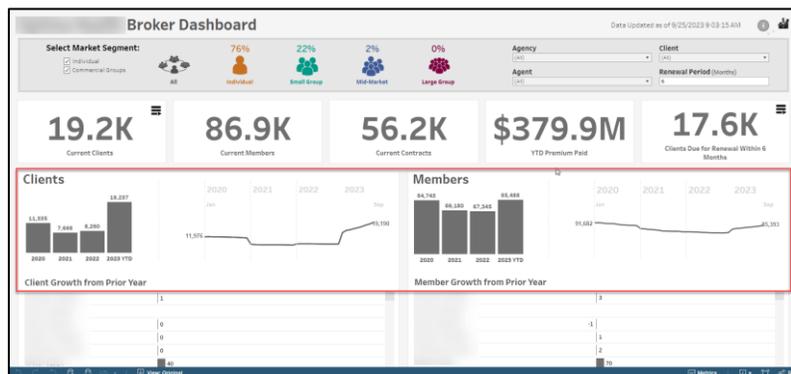
The **Un-filter** icon removes any filters so that all values are shown.



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.



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



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

Broker Dashboard

This dashboard provides a summary and trend of groups and members by market segment.

Depending on your security access, you can view and customize data applicable to your book of business using the following filters:

- Market Segment
- Exclusion of Individual Market
- Agency
- Broker
- Group
- Renewal Period (Months)

Navigation

Clicking the  icon will provide more detailed information about the groups.
Clicking the  icon will return the main page.

Refresh Schedule: Monthly, on the 12th of each month or the closest business day
Scheduled Down Time: 3rd Wednesday of the month between 8pm -12am
4th Wednesday of the month between 8pm -12am
Notice of any unscheduled downtime will be displayed on the Broker home page on Optimahealth.com

Summary Metrics

Current: Active contracts as of the data refresh date

- Groups – Unique count of base groups
- Your list of groups here may differ from what you see in eBroker, this data is loaded monthly and eBroker is real-time
- Members – Sum of retro member counts of the most recent bill date
- Member counts here may differ that what you see in eBroker, each system is loaded on different schedules

Groups sold directly to a General Agency's vendor number are not included in this dashboard.

YTD (year to date)

- Premium – Sum of premium amounts paid by all groups as of data refresh date

Groups Due for Renewal

- Groups that are due for renewal within the user selected Renewal Period (Months)

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

Broker Dashboard

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- Exclusion of Individual Market
- Agency
- Broker
- Group
- Renewal Period (Months)

Navigation

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.

