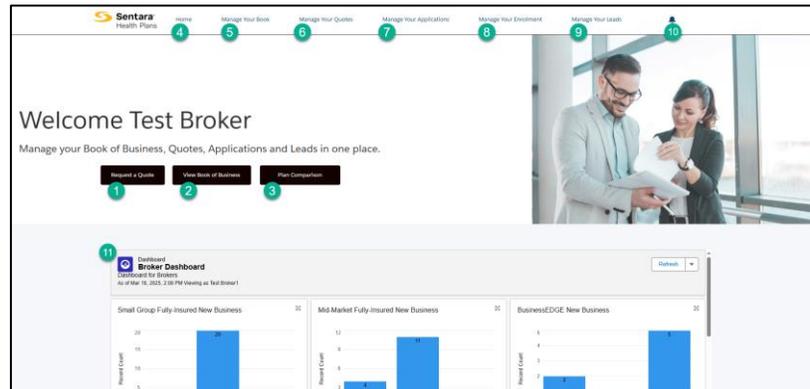


**Purpose:** The purpose of this guide is to outline eBroker navigation, including how to Manage Your Book of Business, Quotes, Applications, Enrollments and Leads.

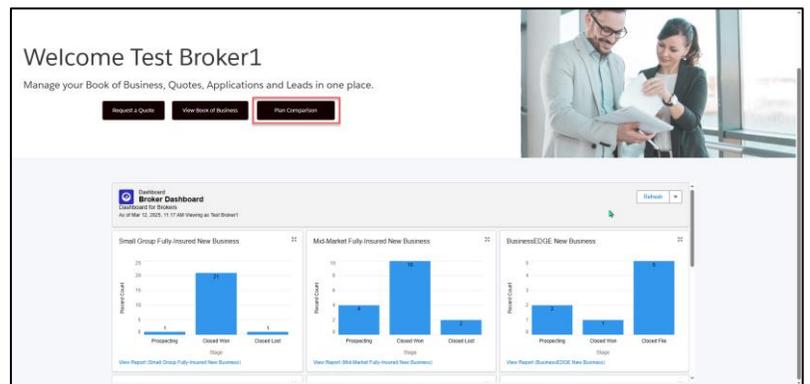
## Navigating The Home Page

The eBroker homepage offers the following options:

1. Request a quote
2. View Book of Business
3. Plan Comparison
4. Home
5. Manage Your Book
6. Manage Your Quotes
7. Manage Your Applications
8. Manage Your Enrollment
9. Manage Your Leads
10. Notification Bell
11. View Dashboard Reports



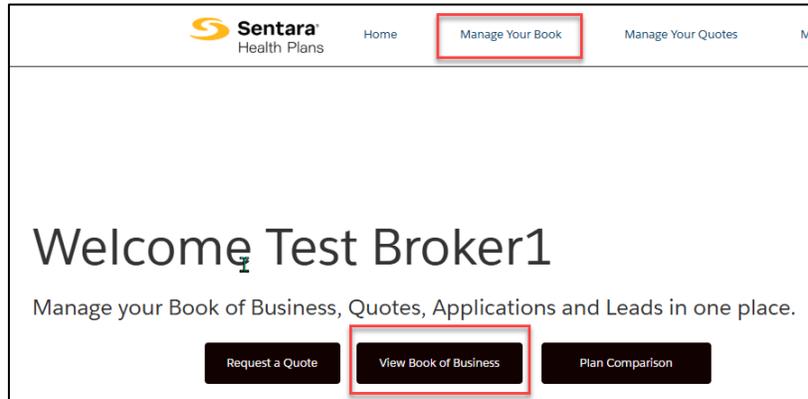
The Plan Comparison Solution leverages an AI tool that generates a side-by-side comparison of Sentara's plans against an incumbent's plan, highlighting differences and similarities.



## Manage Your Book: List Views

From the eBroker screen, click on **View Book of Business** or **Manage Your Book**.

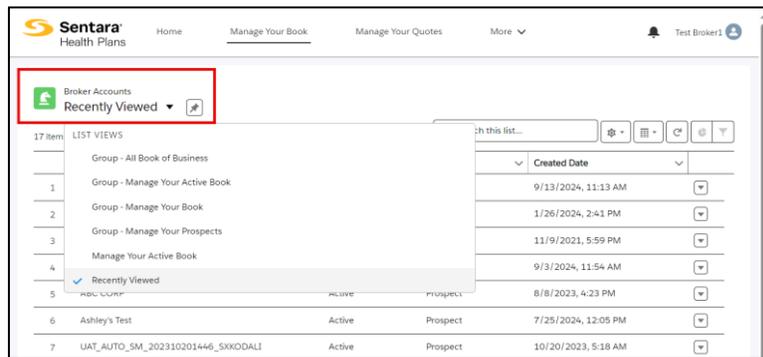
Groups in your Book of Business are called “Broker Accounts”.



All Broker Accounts are shown in “list views”.

The **Manage Your Book** tab defaults to a ‘Recently Viewed’ list.

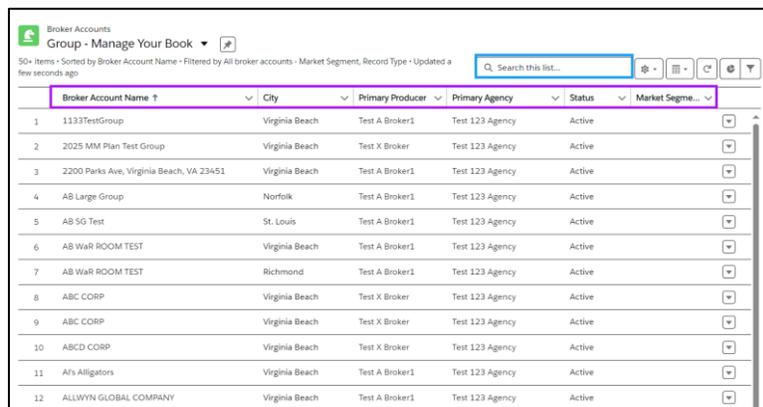
Select the drop down arrow to filter your Broker Accounts into a specific list.



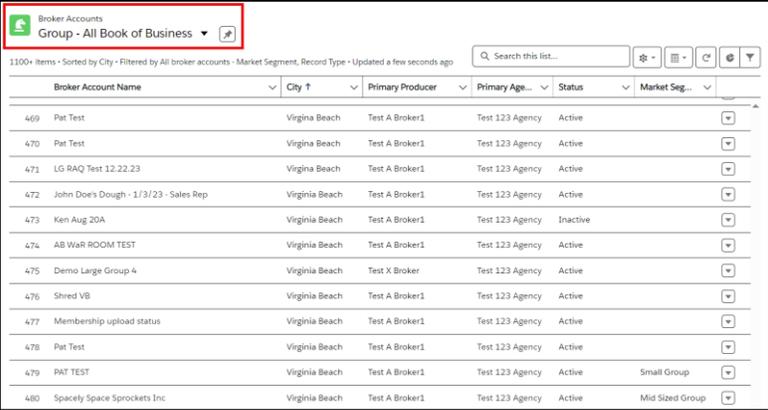
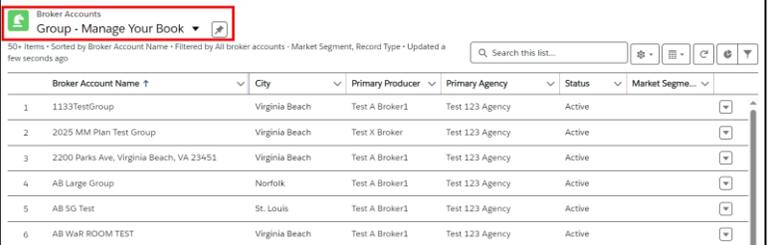
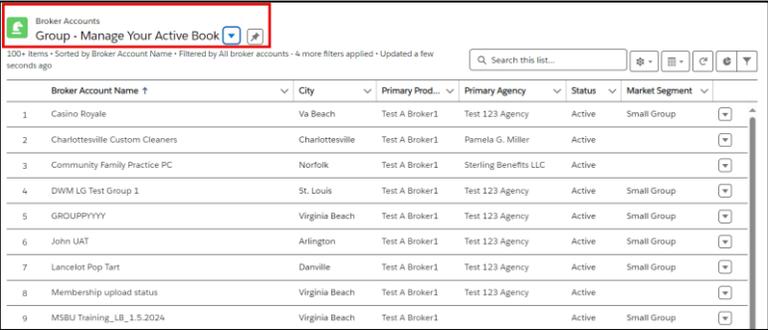
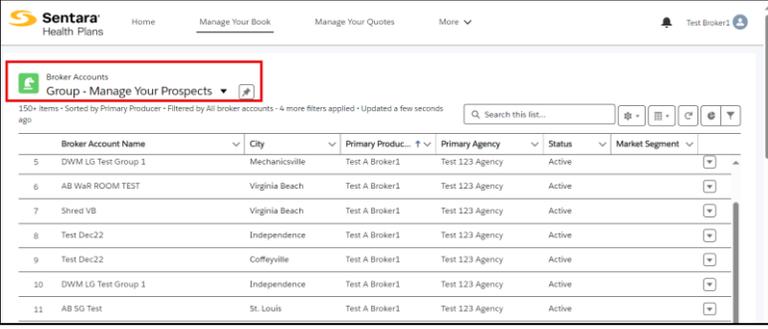
Within each list view, you can:

- A. Sort the lists using the headers at the top.
- B. Search the current list for a specific group.

**Search Tip:** Type the beginning of the Group Name.



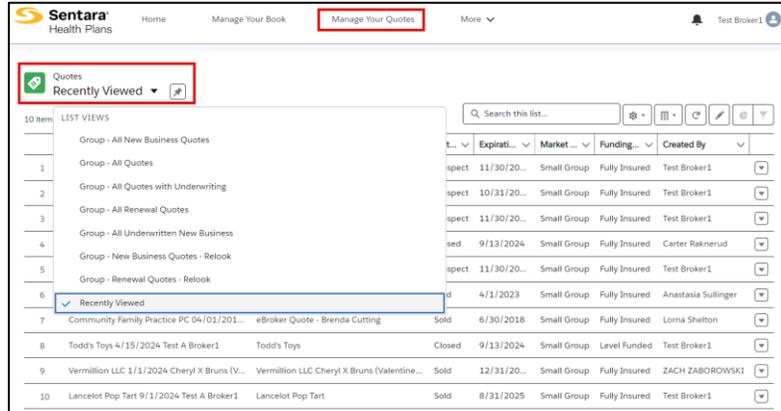
**\*\*The list view pictured is sorted in alphabetical order by clicking on “Broker Account Name” heading at the top of the list.**

| <b>Manage Your Book - Commercial Broker List Views</b>   |   |                     |                       |                   |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
|--|---|---------------------|-----------------------|-------------------|-----------------|--------|-----------------|-----------------------|----------------|----------------|-----------------|--------|-------------|-----------------------------------|-----------------|----------------|------------------|--------|--|--|----------------|----------------|-----------------------|--------|--|---|----------------|----------------|-----------------|--------|-------------|-----------------|----------------|----------------|-----------------|----------|-------------|------------------------|----------------|----------------|-----------------|--------|-------------|------------------------|----------------|----------------|-----------------|--------|-------------|----------------------------|----------------|----------------|-----------------|--------|--|------------------------------|----------------|----------------|-----------------|--------|-------------|--------------|----------------|----------------|-----------------|--------|--|--------------|----------------|----------------|-----------------|--------|-------------|---------------------------------|----------------|----------------|-----------------|--------|-----------------|
| <p><b>Group - All Book of Business</b></p> <p>This list view includes: All Broker Accounts (active, inactive, and prospects)</p> |  <p>1100+ Items - Sorted by City - Filtered by All broker accounts - Market Segment, Record Type - Updated a few seconds ago</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 8px;"> <thead> <tr> <th>Broker Account Name</th> <th>City</th> <th>Primary Producer</th> <th>Primary Age...</th> <th>Status</th> <th>Market Seg...</th> </tr> </thead> <tbody> <tr><td>469 Pat Test</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>470 Pat Test</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>471 LG RAQ Test 12.22.23</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>472 John Doe's Dough - 1/3/23 - Sales Rep</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>473 Ken Aug 20A</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Inactive</td><td></td></tr> <tr><td>474 AB WaR ROOM TEST</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>475 Demo Large Group 4</td><td>Virginia Beach</td><td>Test X Broker</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>476 Shred VB</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>477 Membership upload status</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>478 Pat Test</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>479 PAT TEST</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td>Small Group</td></tr> <tr><td>480 Spacely Space Sprockets Inc</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td>Mid Sized Group</td></tr> </tbody> </table> | Broker Account Name | City                  | Primary Producer  | Primary Age...  | Status | Market Seg...   | 469 Pat Test          | Virginia Beach | Test A Broker1 | Test 123 Agency | Active |             | 470 Pat Test                      | Virginia Beach  | Test A Broker1 | Test 123 Agency  | Active |  | 471 LG RAQ Test 12.22.23                   | Virginia Beach | Test A Broker1 | Test 123 Agency       | Active |  | 472 John Doe's Dough - 1/3/23 - Sales Rep | Virginia Beach | Test A Broker1 | Test 123 Agency | Active |             | 473 Ken Aug 20A | Virginia Beach | Test A Broker1 | Test 123 Agency | Inactive |             | 474 AB WaR ROOM TEST   | Virginia Beach | Test A Broker1 | Test 123 Agency | Active |             | 475 Demo Large Group 4 | Virginia Beach | Test X Broker  | Test 123 Agency | Active |             | 476 Shred VB               | Virginia Beach | Test A Broker1 | Test 123 Agency | Active |  | 477 Membership upload status | Virginia Beach | Test A Broker1 | Test 123 Agency | Active |             | 478 Pat Test | Virginia Beach | Test A Broker1 | Test 123 Agency | Active |  | 479 PAT TEST | Virginia Beach | Test A Broker1 | Test 123 Agency | Active | Small Group | 480 Spacely Space Sprockets Inc | Virginia Beach | Test A Broker1 | Test 123 Agency | Active | Mid Sized Group |
| Broker Account Name  | City  | Primary Producer    | Primary Age...        | Status            | Market Seg...   |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 469 Pat Test   | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
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| 473 Ken Aug 20A  | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Inactive          |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 474 AB WaR ROOM TEST   | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 475 Demo Large Group 4   | Virginia Beach  | Test X Broker       | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 476 Shred VB   | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 477 Membership upload status   | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
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| 480 Spacely Space Sprockets Inc  | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            | Mid Sized Group |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
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| 2 2025 MM Plan Test Group  | Virginia Beach  | Test X Broker       | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
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| 4 AB Large Group   | Norfolk   | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 5 AB SO Test   | St. Louis   | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 6 AB WaR ROOM TEST   | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| <p><b>Group - Manage Your Active Book</b></p> <p>This list view shows only Active Broker Accounts.</p>                           |  <p>100+ Items - Sorted by Broker Account Name - Filtered by All broker accounts - 4 more filters applied - Updated a few seconds ago</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 8px;"> <thead> <tr> <th>Broker Account Name</th> <th>City</th> <th>Primary Prod...</th> <th>Primary Agency</th> <th>Status</th> <th>Market Segment</th> </tr> </thead> <tbody> <tr><td>1 Casino Royale</td><td>Va Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td>Small Group</td></tr> <tr><td>2 Charlottesville Custom Cleaners</td><td>Charlottesville</td><td>Test A Broker1</td><td>Pamela G. Miller</td><td>Active</td><td></td></tr> <tr><td>3 Community Family Practice PC</td><td>Norfolk</td><td>Test A Broker1</td><td>Sterling Benefits LLC</td><td>Active</td><td></td></tr> <tr><td>4 DWM LG Test Group 1</td><td>St. Louis</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td>Small Group</td></tr> <tr><td>5 GROUPLYYYYY</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td>Small Group</td></tr> <tr><td>6 John UAT</td><td>Arlington</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td>Small Group</td></tr> <tr><td>7 Lancelot Pop Tart</td><td>Danville</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td>Small Group</td></tr> <tr><td>8 Membership upload status</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>9 MSBU Training_LB_1.5.2024</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td>Small Group</td></tr> </tbody> </table>  | Broker Account Name | City                  | Primary Prod...   | Primary Agency  | Status | Market Segment  | 1 Casino Royale       | Va Beach       | Test A Broker1 | Test 123 Agency | Active | Small Group | 2 Charlottesville Custom Cleaners | Charlottesville | Test A Broker1 | Pamela G. Miller | Active |  | 3 Community Family Practice PC             | Norfolk        | Test A Broker1 | Sterling Benefits LLC | Active |  | 4 DWM LG Test Group 1                     | St. Louis      | Test A Broker1 | Test 123 Agency | Active | Small Group | 5 GROUPLYYYYY   | Virginia Beach | Test A Broker1 | Test 123 Agency | Active   | Small Group | 6 John UAT             | Arlington      | Test A Broker1 | Test 123 Agency | Active | Small Group | 7 Lancelot Pop Tart    | Danville       | Test A Broker1 | Test 123 Agency | Active | Small Group | 8 Membership upload status | Virginia Beach | Test A Broker1 | Test 123 Agency | Active |  | 9 MSBU Training_LB_1.5.2024  | Virginia Beach | Test A Broker1 | Test 123 Agency | Active | Small Group |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| Broker Account Name  | City  | Primary Prod...     | Primary Agency        | Status            | Market Segment  |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 1 Casino Royale  | Va Beach  | Test A Broker1      | Test 123 Agency       | Active            | Small Group     |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 2 Charlottesville Custom Cleaners  | Charlottesville   | Test A Broker1      | Pamela G. Miller      | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 3 Community Family Practice PC   | Norfolk   | Test A Broker1      | Sterling Benefits LLC | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 4 DWM LG Test Group 1  | St. Louis   | Test A Broker1      | Test 123 Agency       | Active            | Small Group     |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 5 GROUPLYYYYY  | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            | Small Group     |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 6 John UAT   | Arlington   | Test A Broker1      | Test 123 Agency       | Active            | Small Group     |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 7 Lancelot Pop Tart  | Danville  | Test A Broker1      | Test 123 Agency       | Active            | Small Group     |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 8 Membership upload status   | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 9 MSBU Training_LB_1.5.2024  | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            | Small Group     |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| <p><b>Group - Manage Your Prospects</b></p> <p>This list view shows Quotes for Prospective Groups</p>                            |  <p>150+ Items - Sorted by Primary Producer - Filtered by All broker accounts - 4 more filters applied - Updated a few seconds ago</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 8px;"> <thead> <tr> <th>Broker Account Name</th> <th>City</th> <th>Primary Produc...</th> <th>Primary Agency</th> <th>Status</th> <th>Market Segment</th> </tr> </thead> <tbody> <tr><td>5 DWM LG Test Group 1</td><td>Mechanicsville</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>6 AB WaR ROOM TEST</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>7 Shred VB</td><td>Virginia Beach</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>8 Test Dec22</td><td>Independence</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>9 Test Dec22</td><td>Coffeyville</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>10 DWM LG Test Group 1</td><td>Independence</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> <tr><td>11 AB SO Test</td><td>St. Louis</td><td>Test A Broker1</td><td>Test 123 Agency</td><td>Active</td><td></td></tr> </tbody> </table>  | Broker Account Name | City                  | Primary Produc... | Primary Agency  | Status | Market Segment  | 5 DWM LG Test Group 1 | Mechanicsville | Test A Broker1 | Test 123 Agency | Active |             | 6 AB WaR ROOM TEST                | Virginia Beach  | Test A Broker1 | Test 123 Agency  | Active |  | 7 Shred VB                                 | Virginia Beach | Test A Broker1 | Test 123 Agency       | Active |  | 8 Test Dec22                              | Independence   | Test A Broker1 | Test 123 Agency | Active |             | 9 Test Dec22    | Coffeyville    | Test A Broker1 | Test 123 Agency | Active   |             | 10 DWM LG Test Group 1 | Independence   | Test A Broker1 | Test 123 Agency | Active |             | 11 AB SO Test          | St. Louis      | Test A Broker1 | Test 123 Agency | Active |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| Broker Account Name  | City  | Primary Produc...   | Primary Agency        | Status            | Market Segment  |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 5 DWM LG Test Group 1  | Mechanicsville  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 6 AB WaR ROOM TEST   | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 7 Shred VB   | Virginia Beach  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 8 Test Dec22   | Independence  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 9 Test Dec22   | Coffeyville   | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 10 DWM LG Test Group 1   | Independence  | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |
| 11 AB SO Test  | St. Louis   | Test A Broker1      | Test 123 Agency       | Active            |                 |        |                 |                       |                |                |                 |        |             |                                   |                 |                |                  |        |  |  |                |                |                       |        |  |   |                |                |                 |        |             |                 |                |                |                 |          |             |                        |                |                |                 |        |             |                        |                |                |                 |        |             |                            |                |                |                 |        |  |                              |                |                |                 |        |             |              |                |                |                 |        |  |              |                |                |                 |        |             |                                 |                |                |                 |        |                 |

## Manage Your Quotes: List Views

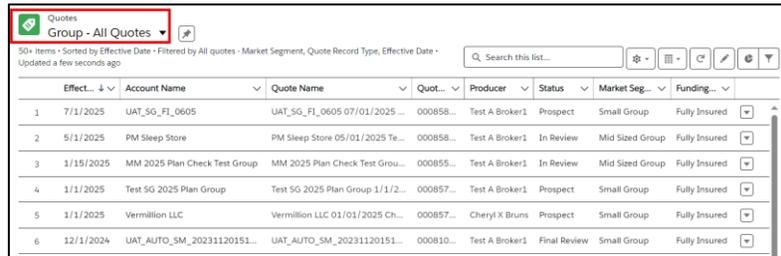
### Group – Recently Viewed

The default list view is “recently viewed”. Select the drop down arrow to show list view filter options.



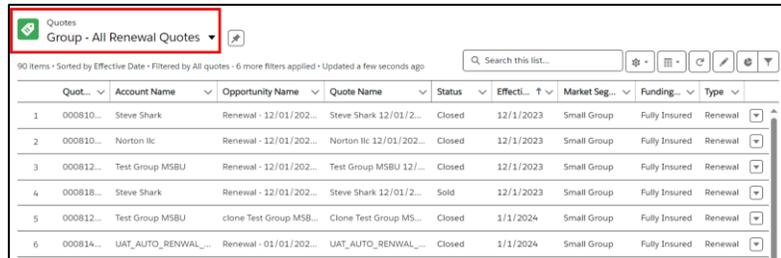
| Exp...      | Market...   | Funding...    | Created By          |
|-------------|-------------|---------------|---------------------|
| 11/30/20... | Small Group | Fully Insured | Test Broker1        |
| 10/31/20... | Small Group | Fully Insured | Test Broker1        |
| 11/30/20... | Small Group | Fully Insured | Test Broker1        |
| 9/13/2024   | Small Group | Fully Insured | Carter Raknerud     |
| 11/30/20... | Small Group | Fully Insured | Test Broker1        |
| 4/1/2023    | Small Group | Fully Insured | Anastasia Sullinger |
| 6/30/2018   | Small Group | Fully Insured | Lorna Shelton       |
| 9/13/2024   | Small Group | Level Funded  | Test Broker1        |
| 12/31/20... | Small Group | Fully Insured | ZACH ZABOROWSKI     |
| 8/31/2025   | Small Group | Fully Insured | Test Broker1        |

### Group - All Quotes



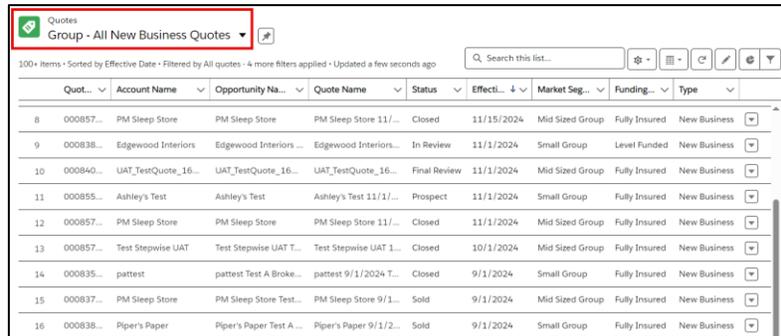
| Effect... | Account Name                  | Quote Name                       | Quot...   | Producer       | Status       | Market Seg...   | Funding...    |
|-----------|-------------------------------|----------------------------------|-----------|----------------|--------------|-----------------|---------------|
| 7/1/2025  | UAT_SG_FI_0605                | UAT_SG_FI_0605 07/01/2025 ...    | 000858... | Test A Broker1 | Prospect     | Small Group     | Fully Insured |
| 5/1/2025  | PM Sleep Store                | PM Sleep Store 05/01/2025 Te...  | 000858... | Test A Broker1 | In Review    | Mid Sized Group | Fully Insured |
| 1/15/2025 | MM 2025 Plan Check Test Group | MM 2025 Plan Check Test Gro...   | 000855... | Test A Broker1 | In Review    | Mid Sized Group | Fully Insured |
| 1/1/2025  | Test SG 2025 Plan Group       | Test SG 2025 Plan Group 1/1/2... | 000857... | Test A Broker1 | Prospect     | Small Group     | Fully Insured |
| 1/1/2025  | Vermillion LLC                | Vermillion LLC 01/01/2025 Ch...  | 000857... | Cheryl X Bruns | Prospect     | Small Group     | Fully Insured |
| 12/1/2024 | UAT_AUTO_SM_20231120151...    | UAT_AUTO_SM_20231120151...       | 000810... | Test A Broker1 | Final Review | Small Group     | Fully Insured |

### Group - All Renewal Quotes



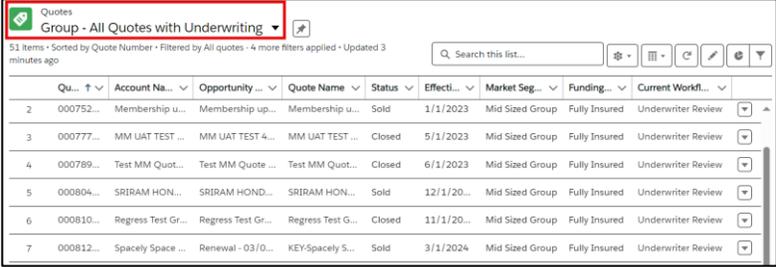
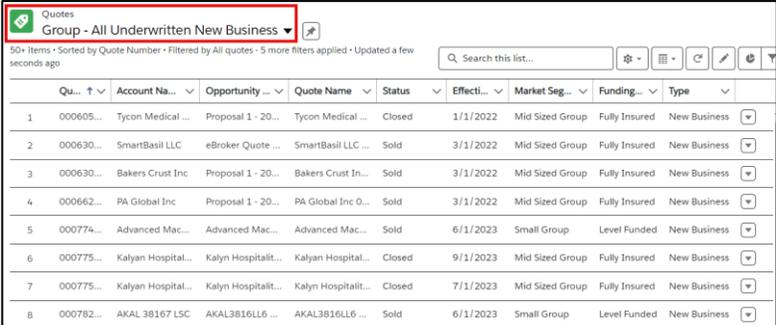
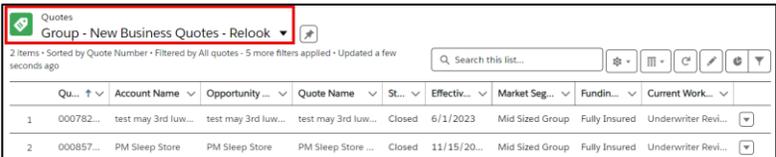
| Quot...   | Account Name        | Opportunity Na...       | Quote Name              | Status | Effecti... | Market Seg... | Funding...    | Type    |
|-----------|---------------------|-------------------------|-------------------------|--------|------------|---------------|---------------|---------|
| 000810... | Steve Shark         | Renewal - 12/01/202...  | Steve Shark 12/01/2...  | Closed | 12/1/2023  | Small Group   | Fully Insured | Renewal |
| 000810... | Norton Ilc          | Renewal - 12/01/202...  | Norton Ilc 12/01/202... | Closed | 12/1/2023  | Small Group   | Fully Insured | Renewal |
| 000812... | Test Group MSBU     | Renewal - 12/01/202...  | Test Group MSBU 12/...  | Closed | 12/1/2023  | Small Group   | Fully Insured | Renewal |
| 000818... | Steve Shark         | Renewal - 12/01/202...  | Steve Shark 12/01/2...  | Sold   | 12/1/2023  | Small Group   | Fully Insured | Renewal |
| 000812... | Test Group MSBU     | clone Test Group MSB... | Clone Test Group MS...  | Closed | 1/1/2024   | Small Group   | Fully Insured | Renewal |
| 000814... | UAT_AUTO_RENEWAL... | Renewal - 01/01/202...  | UAT_AUTO_RENEWAL...     | Closed | 1/1/2024   | Small Group   | Fully Insured | Renewal |

### Group - All New Business Quotes



| Quot...   | Account Name        | Opportunity Na...        | Quote Name             | Status       | Effecti... | Market Seg...   | Funding...    | Type         |
|-----------|---------------------|--------------------------|------------------------|--------------|------------|-----------------|---------------|--------------|
| 000857... | PM Sleep Store      | PM Sleep Store           | PM Sleep Store 11/...  | Closed       | 11/15/2024 | Mid Sized Group | Fully Insured | New Business |
| 000838... | Edgewood Interiors  | Edgewood Interiors ...   | Edgewood Interiors...  | In Review    | 11/1/2024  | Small Group     | Level Funded  | New Business |
| 000840... | UAT_TestQuote_16... | UAT_TestQuote_16...      | UAT_TestQuote_16...    | Final Review | 11/1/2024  | Mid Sized Group | Fully Insured | New Business |
| 000855... | Ashley's Test       | Ashley's Test            | Ashley's Test 11/1/... | Prospect     | 11/1/2024  | Small Group     | Fully Insured | New Business |
| 000857... | PM Sleep Store      | PM Sleep Store           | PM Sleep Store 11/...  | Closed       | 11/1/2024  | Mid Sized Group | Fully Insured | New Business |
| 000857... | Test Stepwise UAT   | Test Stepwise UAT T...   | Test Stepwise UAT 1... | Closed       | 10/1/2024  | Mid Sized Group | Fully Insured | New Business |
| 000835... | pattest             | pattest Test A Broke...  | pattest 9/1/2024 T...  | Closed       | 9/1/2024   | Small Group     | Fully Insured | New Business |
| 000837... | PM Sleep Store      | PM Sleep Store Test...   | PM Sleep Store 9/1/... | Sold         | 9/1/2024   | Mid Sized Group | Fully Insured | New Business |
| 000838... | Piper's Paper       | Piper's Paper Test A ... | Piper's Paper 9/1/2... | Sold         | 9/1/2024   | Small Group     | Fully Insured | New Business |

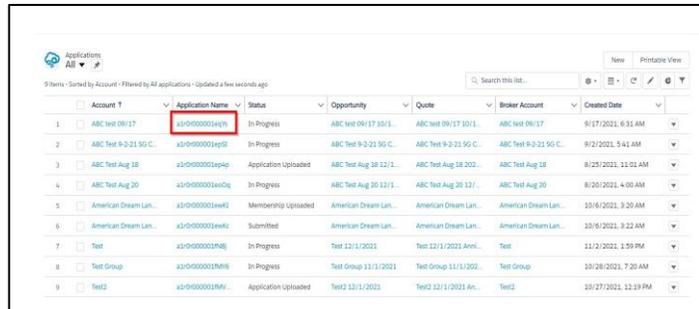
## Manage Your Quotes: List Views

|  |  |
|--|--|
| <p><b>Group - All Quotes with Underwriting</b></p> <p>This list view shows all quotes that have been submitted to Underwriting for review.</p> |  <p>The screenshot shows a list of 51 quotes. The filter dropdown is set to 'Group - All Quotes with Underwriting'. The table columns include Quote Number, Account Name, Opportunity Name, Quote Name, Status, Effective Date, Market Segment, Funding, and Current Workflow Step. The first few rows show quotes with statuses like 'Sold' and 'Closed'.</p> |
| <p><b>Group - All Underwritten New Business</b></p> <p>This list view includes all new business Quotes that have been underwritten by SHP.</p> |  <p>The screenshot shows a list of 50+ quotes. The filter dropdown is set to 'Group - All Underwritten New Business'. The table columns include Quote Number, Account Name, Opportunity Name, Quote Name, Status, Effective Date, Market Segment, Funding, and Type. The 'Type' column is highlighted in blue, and all entries are 'New Business'.</p>        |
| <p><b>Group - New Business Quotes - Relook</b></p>   |  <p>The screenshot shows a list of 2 items. The filter dropdown is set to 'Group - New Business Quotes - Relook'. The table columns include Quote Number, Account Name, Opportunity Name, Quote Name, Status, Effective Date, Market Segment, Funding, and Current Workflow Step. The 'Current Workflow Step' column is highlighted in blue.</p>             |
| <p><b>Group - Renewal Quotes - Relook</b></p>  |  <p>The screenshot shows a list of 2 items. The filter dropdown is set to 'Group - Renewal Quotes - Relook'. The table columns include Quote Number, Account Name, Opportunity Name, Quote Name, Status, Effective Date, Market Segment, Funding, and Current Workflow Step. The 'Current Workflow Step' column is highlighted in blue.</p>                  |

## Manage Your Applications

Click **Manage Your Applications** to view all your applications. Click on the link listed in the column under the **Application Name** to access the application's page.

On the application detail screen, you will be able to view all information related to the application, view and upload Required Application Documents and perform application activities if applicable.



| Account               | Application Name | Status               | Opportunity           | Quote                 | Broker Account        | Created Date         |
|-----------------------|------------------|----------------------|-----------------------|-----------------------|-----------------------|----------------------|
| ABC Test 09/17        | 430-0000034q7s   | In-Progress          | ABC Test 09/17 10/1   | ABC Test 09/17 10/1   | ABC Test 09/17        | 9/17/2021, 6:31 AM   |
| ABC Test 9-2-21 90 C  | 430-0000034q7s   | In-Progress          | ABC Test 9-2-21 90 C  | ABC Test 9-2-21 90 C  | ABC Test 9-2-21 90 C  | 9/2/2021, 5:43 AM    |
| ABC Test Aug 18       | 430-0000034q7s   | Application Uploaded | ABC Test Aug 18 12/1  | ABC Test Aug 18 202   | ABC Test Aug 18       | 8/25/2021, 11:02 AM  |
| ABC Test Aug 20       | 430-0000034q7s   | In-Progress          | ABC Test Aug 20 12/1  | ABC Test Aug 20 12/1  | ABC Test Aug 20       | 8/20/2021, 4:00 AM   |
| American Dream Lan... | 430-0000034q7s   | Membership Uploaded  | American Dream Lan... | American Dream Lan... | American Dream Lan... | 10/4/2021, 9:20 AM   |
| American Dream Lan... | 430-0000034q7s   | Submitted            | American Dream Lan... | American Dream Lan... | American Dream Lan... | 10/9/2021, 9:22 AM   |
| Test                  | 430-0000034q7s   | In-Progress          | Test 12/1/2021        | Test 12/1/2021 Ann... | Test                  | 11/2/2021, 3:59 PM   |
| Test Group            | 430-0000034q7s   | In-Progress          | Test Group 11/1/2021  | Test Group 11/1/2021  | Test Group            | 10/28/2021, 7:20 AM  |
| Test2                 | 430-0000034q7s   | Application Uploaded | Test2 12/1/2021       | Test2 12/1/2021 An... | Test2                 | 10/27/2021, 12:19 PM |

**\*Note** If you click on the Account Name you won't be taken to the Application screen. Be sure to click on the Application Name. The Application Name is system generated.

## Manage Your Enrollments

Click **Manage Your Enrollment** to view all your enrollment accounts.

Click on the **Account Name** to view an account.



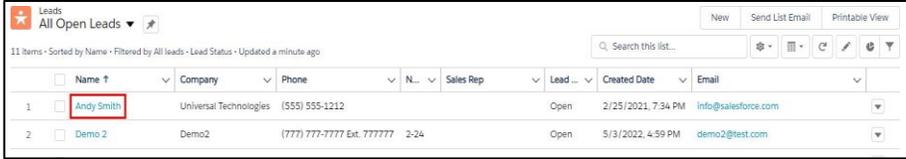
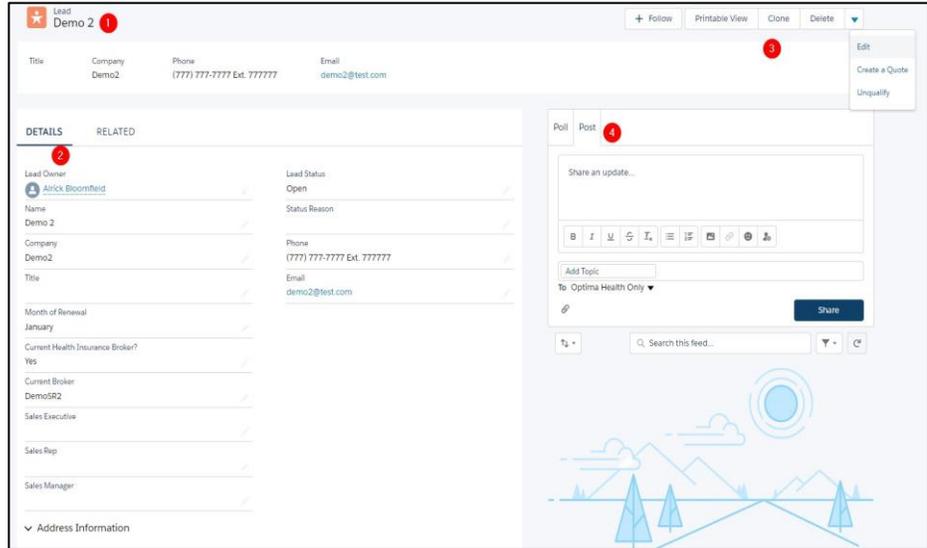
| Account Name                       | Account Site | Billing State/...     | Phone    | Type  | Account Owner ... |
|------------------------------------|--------------|-----------------------|----------|-------|-------------------|
| Adviance Safety Equipment Company  | Virginia     | (757) 248-8802        | Customer | muser |                   |
| Blue Ridge Regional Jail Authority | Virginia     | 434-847-3100 Ext. 210 | Customer | muser |                   |

**Note:** This function is only available if the group utilizes e3 web enrollment. If a group enrolls utilizing other enrollment methods, the function to Manage Enrollment through eBroker is not available for those groups.

From the Manage Your Enrollments function you can perform the following tasks:

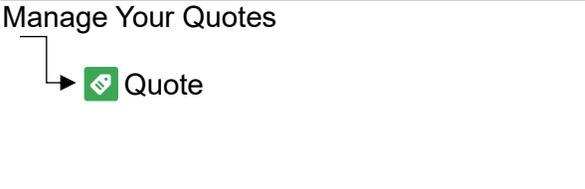
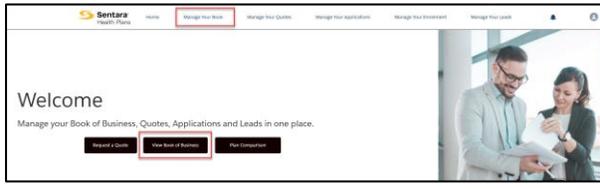
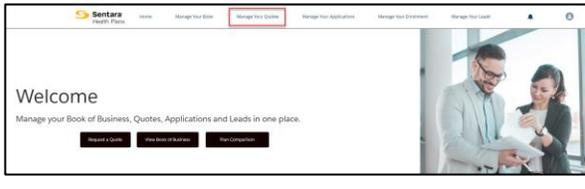
- view group details
- view member information
- make modifications to member information
- update dependent information
- add subscribers and dependents
- terminate coverage
- make plan changes during open enrollment

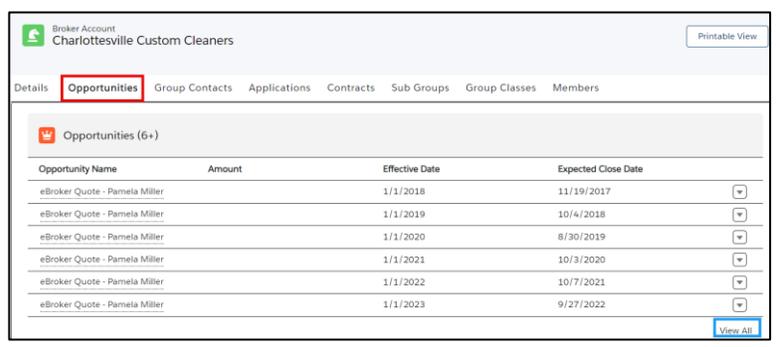
Manage Your Leads

|   |   |
|---|---|
| <p>Click <b>Manage Your Leads</b> to view all your leads. Click on the <b>Lead Name</b> to view a lead.</p>   |   |
| <p>On the Lead Details screen, you can access a variety of information and functions.</p> <ol style="list-style-type: none"> <li>1. view high level demographic details</li> <li>2. view and edit specific information related to the lead. To make an edit to a field, hover over the field and click the pencil icon on the right of the field. Remember to click <b>Save</b> after making your edits</li> <li>3. perform a variety of functions related to the lead including <b>Follow, Clone, Delete, Edit, Create a Quote, Unqualify</b> viewing a <b>Printable View</b></li> <li>4. make a post/share an update related</li> </ol> |  |

to the Lead.  
Select who to send the update to and click **Share**

There are 2 paths you can take to find Quotes in the system:

| Path (A): Manage Your Book  | Path (B): Manage your Quotes   |
|---|--|
| <p>Manage Book of Business/Manage your Book</p>  | <p>Manage Your Quotes</p>  |
|   |                           |

|  |  |
|--|--|
| <p><b>Broker Account record</b></p> <p>The Broker Account shows Opportunities, contacts, applications, contracts, subgroups, group classes and Membership for a group.</p>   |  |
| <p><b>Opportunities Tab</b></p> <p>The Opportunities Tab does not use a list view filter. This Tab shows all historical and upcoming Opportunities.</p> <p>Tip: Click on the “View All” option to show the full list of Opportunities.</p> |  |

### Quotes record

This record shows Quote details, Files, Plan information. Here are also options to Edit, Clone, and Generate new Proposals.

Renewal Proposal Files are released on this Quote Record under Related Tab.

**Quote**  
Charlottesville Custom Cleaners 04/01/2024 Test A Broker1

| Quote Number | Expiration Date | Opportunity ID   | Status | Type    |
|--------------|-----------------|--|--------|---------|
| 00081053     | 9/13/2024       | Renewal - 04/01/2024 - Charlottesville Custom Cleaners | Closed | Renewal |



Details Related

|                  |   |                 |           |
|------------------|---|-----------------|-----------|
| Quote Number     | 00081053  | Effective Date  | 4/1/2024  |
| Quote Name       | Charlottesville Custom Cleaners 04/01/2024 Test A Broker1 | Expiration Date | 9/13/2024 |
| Opportunity Name | Renewal - 04/01/2024 - Charlottesville Custom Cleaners    | Renewal Month   | September |

Renewals: at-a-glance

Original Renewal Proposals will be released by SHP Sales Teams in the “Files” section of the Related Tab on the Quote record.

*This is the proposal that will go to the BA’s.*

The Original Renewal visibility is the broker’s queue to clone, edit and generate additional proposals as needed.

**Quote**  
Mickey Mouse Clubhouse 12/1/2024 Test A Broker1

Accept Quote Generate Proposal Clone Quote

| Quote Number | Expiration Date | Opportunity ID         | Status   | Type         |
|--------------|-----------------|------------------------|----------|--------------|
| 00085793     | 11/30/2025      | Mickey Mouse Clubhouse | Prospect | New Business |



**Files (1)**

2024 Original Renewal Proposal Document.pdf  
Oct 7, 2024 - 2.1MB - pdf

[View All](#)

*Renewal Quotes with no original proposal in the Files section will be visible, however will not generate rates on any proposal until released by the SHP Sales Team.*

Quotes: at-a-glance

Quotes will give options for:

**Edit Quote** – Adding or Removing Plan options

**Clone Quote** – Changing the Census, Funding Type or Effective Date.

**Generate Proposal** - Any time a change is made to a quote, generate a new Proposal.

**Quote**  
Mickey Mouse Clubhouse 12/1/2024 Test A Broker1

Accept Quote Generate Proposal Clone Quote

| Quote Number | Expiration Date | Opportunity ID         | Status   | Type         |
|--------------|-----------------|------------------------|----------|--------------|
| 00085793     | 11/30/2025      | Mickey Mouse Clubhouse | Prospect | New Business |



Edit Quote  
Close Quote

Related
Details

Quote Line Items (3)

| Product  | Pharmacy Code | Product Type | Product Sub Type | Total |
|--|---------------|--------------|------------------|-------|
| Sentara Direct Vantage Silver 4000 Ded 250 Rx Ded CLS AD:25/50/20%/20%; \$350 max; \$250 RX DED    | SG2024/CAC36A | Medical      | HMO              | \$2.5 |
| Sentara Direct Vantage Gold 1000 Ded 200 Rx Ded CLS BD: 15/AD: 50/30%/30%; \$350 max; \$200 RX DED | SG2024/CAC15A | Medical      | HMO              | \$2.8 |
| Sentara Direct Vantage Gold 2000 Ded 100 Rx Ded CLS AD: 25/50/20%/20%; \$350 max; \$100 RX DED     | SG2024/CAC27A | Medical      | HMO              | \$2.8 |

[View All](#)

Files (1)

2024 New Business Proposal Document.pdf  
Oct 7, 2024 - 2.1MB - pdf

[View All](#)