

Purpose: To outline the functionality available to Employers and Benefit Administrators when accessing e3 Web Enrollment to manage members and to give insight into the process for Brokers.

Group Details Page [Page 2](#)

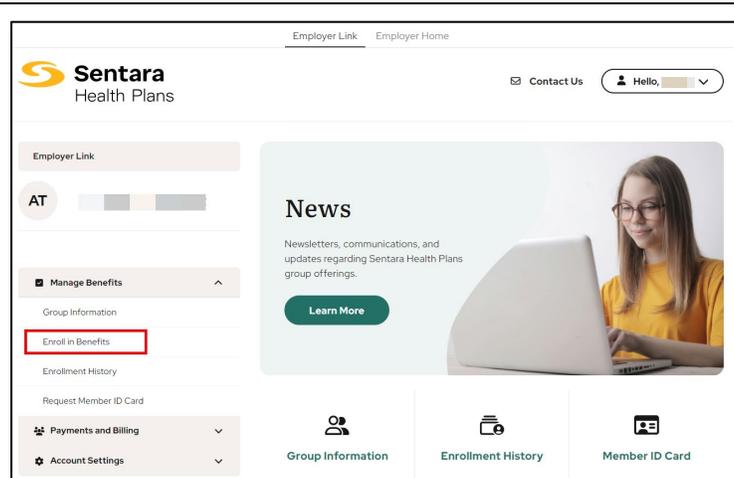
Add Subscriber..... [Page 3](#)

Member Details Page..... [Page 7](#)

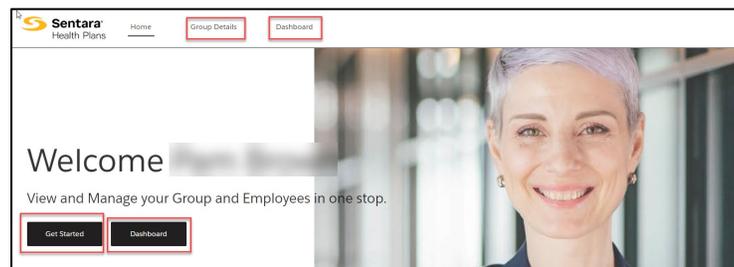
Member Updates..... [Page 8](#)

Processing Life Events..... [Page 9](#)

After you login, the Sentara Health Plans landing page displays. Under the **Manage Benefits** Section on the left, click on **Enroll in Benefits** to take you to the e3 Web Enrollment homepage.

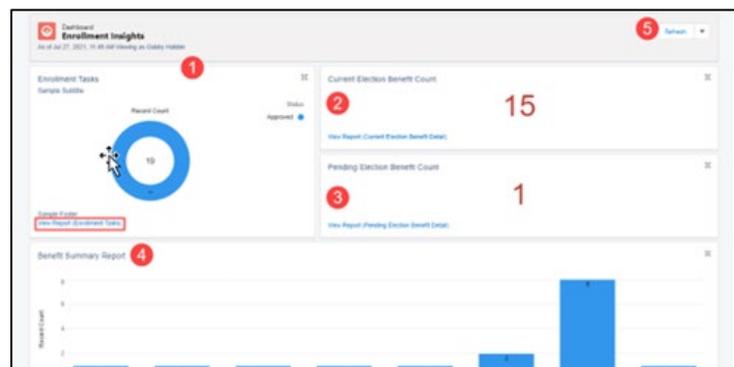


Click on **Dashboard** at the top or in the middle of the page to be taken to the Dashboard with all the reports.



Click on **Get Started** or **Group Details** to be taken to the **Groups Details** page.

The **Dashboard** serves as the work queue.



Each section's metrics are viewable as a report format by clicking **View Report** at the bottom left of each dashboard.

For the metrics contained in items 1 and 4, click on the circle graph or bar graph to view details and engage in specific tasks.

Group Details Page

The group details page provides high-level information about Accounts. The Members section at the bottom of the Group Details page has actionable options for managing enrollment.

To view or edit a group, click **View Group/Subgroup** on the **Actions** dropdown arrow to the right of each Group's row.

GROUP/SUBGROUP NAME	TYPE	CONTRACT START DATE	CONTRACT END DATE	ACTIONS
Acme group-MAIN	Group	05/01/2021	06/01/2023	
Acme Sub Group (Has Sub Groups)	Subgroup	05/01/2021	06/01/2023	

You will be taken to the **Group Demographics** page where you can:

1. View high level group information
2. View group demographics
3. Engage in enrollment tasks
4. Approve transactions
5. View enrollment insights
6. View group contacts, including benefits administration, billing, and general contacts
7. View employee classes
8. View a list of members
9. Add a new subscriber
10. Modify existing subscriber information (by clicking the **Actions** arrow at the far right of the row)

Acme group-MAIN

Group Number: 000258 | Group Type: Group | Contract Start Date: 05/01/2021 | Contract End Date: 06/01/2023 | Contract Renewal Date: 06/02/2023

Group Demographics

Address: U.S. Route 66, Albuquerque, NM, Zip Code, Phone Number: (242) 342-4241, Fax Number

Enrollment Tasks

Enrollment Tasks | **Approve All Transactions**

Enrollment Insights

Current Election Benefit Detail, Benefit Summary Report, Pending Election Benefit Detail, Employee Census Report

Group Contact

CONTACT NAME	PHI	ADDRESS	PHONE NUMBER	FAX NUMBER
Gabby Habble	true		(456) 577-6599	
Ryan Benefit Admin	false		(312) 212-6706	

Billing

CONTACT NAME	PHI	ADDRESS	PHONE NUMBER	FAX NUMBER
No data to show				

General

CONTACT NAME	PHI	ADDRESS	PHONE NUMBER	FAX NUMBER
Henry Wilson			1197-683683683	

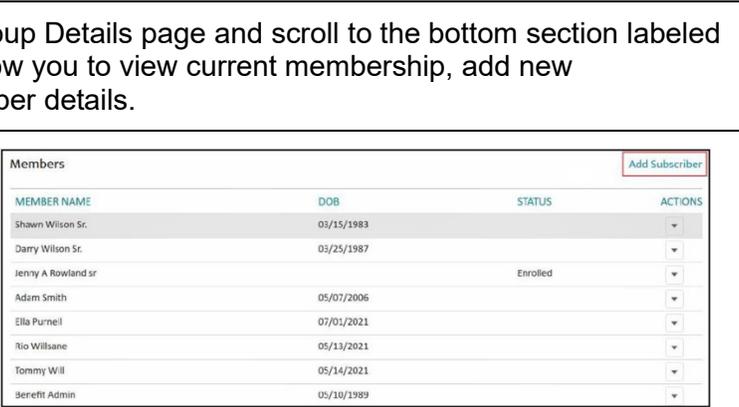
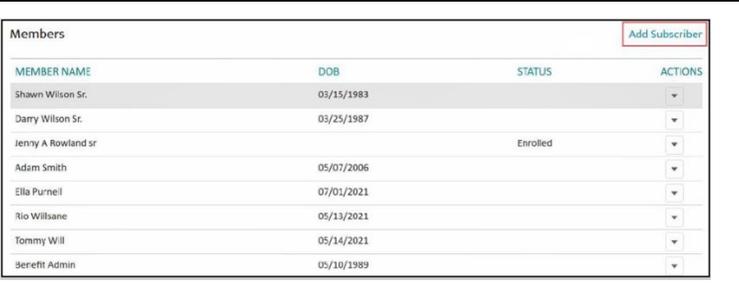
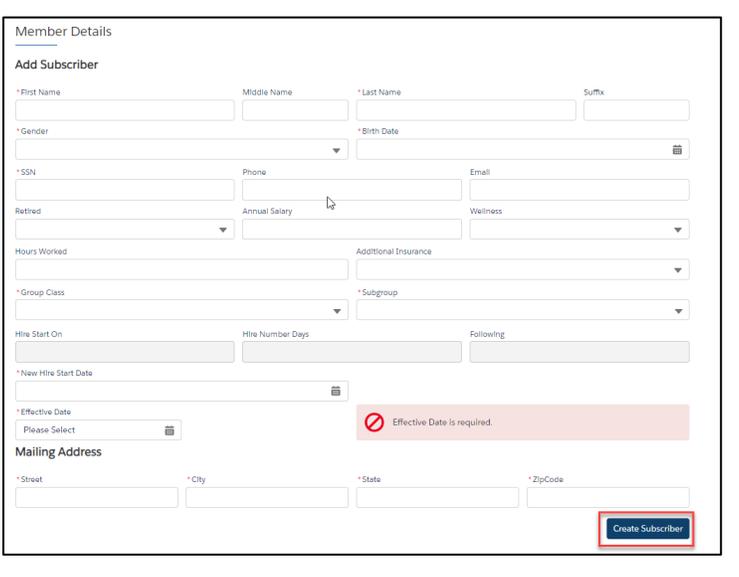
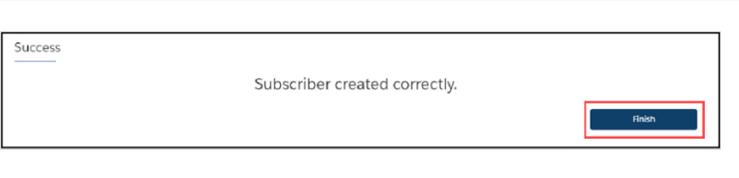
Employee Class

EMPLOYEE CLASS	NEW HIRE	FOLLOWING	NUMBER OF DAYS
Manager	1st day of Month following	Days of employment	30
Doctors/Nurse Practitioners	1st day of Month following	Date of hire	
Managers	1st day of Month following	Days of employment	30

Members

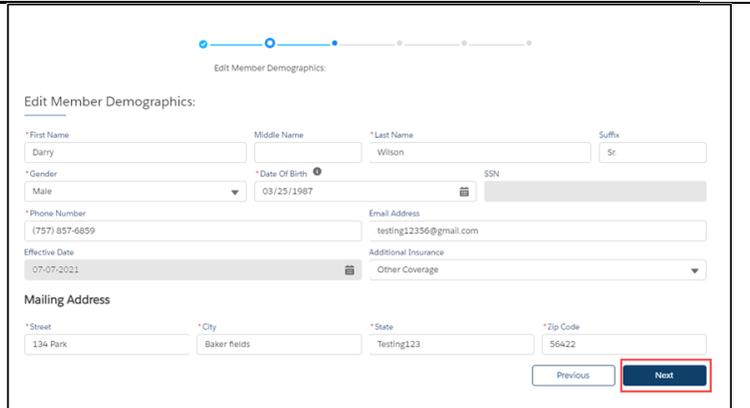
MEMBER NAME	DOB	STATUS	ACTIONS
ABCD Wilson	07/11/2002	Active	
Adam Eve	04/01/2000	Active	

Add Subscriber

Add Subscriber	
<p>To Add a new Subscriber, start on the Group Details page and scroll to the bottom section labeled “Members”. The members section will allow you to view current membership, add new subscribers, and manage individual member details.</p>	
<p>To add a new subscriber to a Group, click Add Subscriber.</p>	
<p>Provide the required details about the member. Required information includes:</p> <ul style="list-style-type: none"> • Demographic information: first and last name, gender, birthdate, phone number, and address • Group class • New hire start date <p>Note: These fields are starred.</p> <p>Click Create Subscriber when you are done entering the information.</p>	
<p>If the subscriber was created successfully, you will receive a confirmation message on the next screen.</p>	
<p>Once you have successfully created the new subscriber, the site will auto direct you to the Member Details page.</p> <p>On the Member Details page, click Start Open Enrollment (or Current Enrollment if the employer is not in the open enrollment period during hire).</p>	
<p>Confirm that the information on the Edit Member Demographics screen</p>	

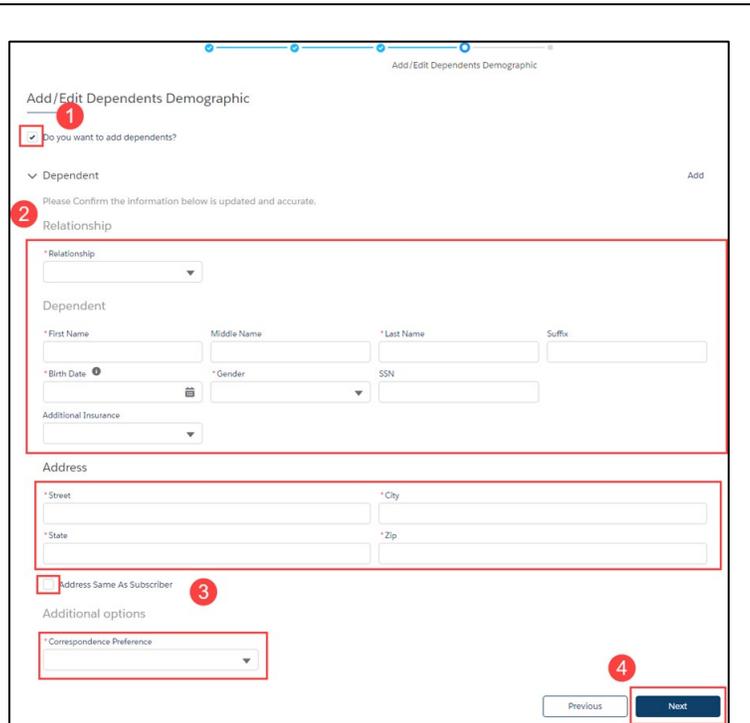
is correct, make any necessary edits, and click **Next**.

Note: You cannot edit the SSN and Effective Date. You must send an email request to e3_inquiries@sentara.com to have these fields changed.



On this screen:

1. To add dependents, click the box next to “Do you want to add dependents?”. If you don’t want to add dependents, skip to step 4 (click **Next**).
2. Provide the required information.
3. Provide the dependent’s address.
 - If different from the primary subscriber, please type in the address and select their correspondence preference from the dropdown menu (either **ID Card Only** or **All Correspondence**).
 - If the address is the same as the primary subscriber, click the box by **Address Same As Subscriber** (below the address fields).
4. Click **Next**.



Note: The **OOA Dependent Program** will only populate when an eligible plan is selected. If clicked for an eligible dependent, a hyperlink to an overview/FAQ will populate.

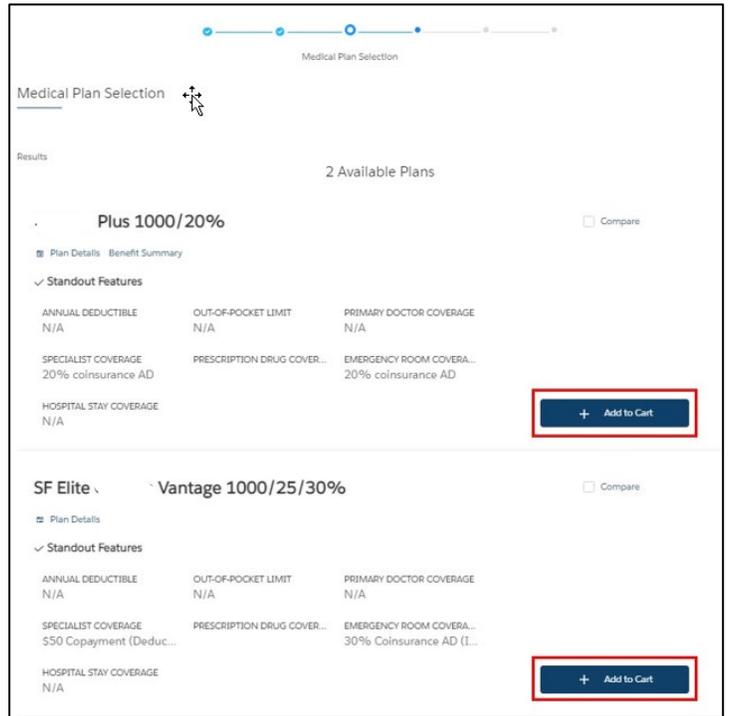


Dependent Name	Relationship	OOA Dependent Program
<input checked="" type="checkbox"/> Rhonda Test	Spouse	
<input checked="" type="checkbox"/> First Child	Child	<input type="text" value="v"/>
<input checked="" type="checkbox"/> Second Child	Child	<input type="checkbox"/>

OOA Dependent Program

When multiple plans are available, select your plan by clicking **Add to Cart**.

To remove a plan from your cart, hover over **Add to Cart**, and select **Remove**.



Medical Plan Selection

Results 2 Available Plans

Plus 1000/20% Compare

Plan Details Benefit Summary

Standout Features

ANNUAL DEDUCTIBLE N/A	OUT-OF-POCKET LIMIT N/A	PRIMARY DOCTOR COVERAGE N/A
SPECIALIST COVERAGE 20% coinsurance AD	PRESCRIPTION DRUG COVER...	EMERGENCY ROOM COVERA... 20% coinsurance AD
HOSPITAL STAY COVERAGE N/A		

+ Add to Cart

SF Elite Vantage 1000/25/30% Compare

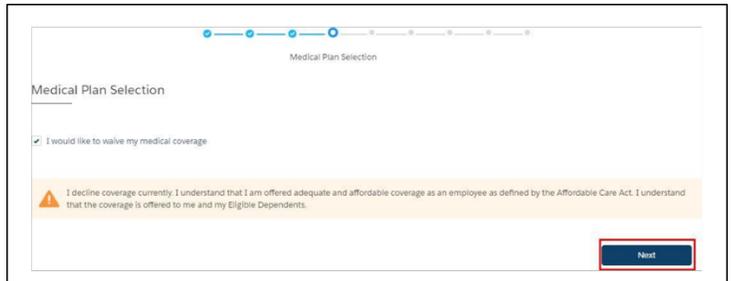
Plan Details

Standout Features

ANNUAL DEDUCTIBLE N/A	OUT-OF-POCKET LIMIT N/A	PRIMARY DOCTOR COVERAGE N/A
SPECIALIST COVERAGE \$50 Copayment (Deduc...	PRESCRIPTION DRUG COVER...	EMERGENCY ROOM COVERA... 30% Coinsurance AD (I...
HOSPITAL STAY COVERAGE N/A		

+ Add to Cart

If the member has elected to waive coverage, click the box accepting the confirmation statement and click **Next**.



Medical Plan Selection

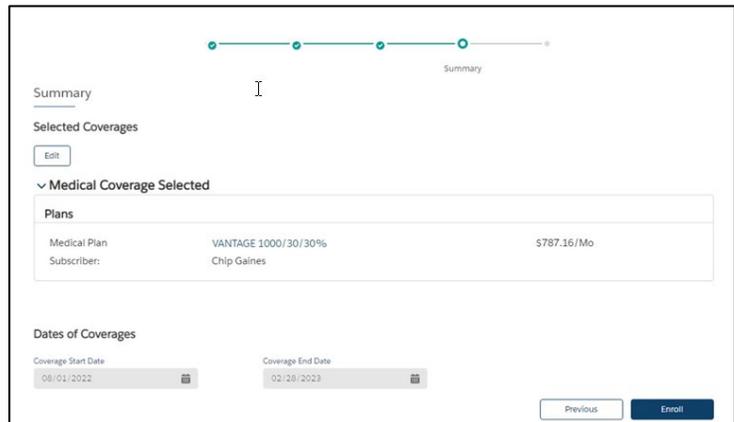
I would like to waive my medical coverage

I decline coverage currently. I understand that I am offered adequate and affordable coverage as an employee as defined by the Affordable Care Act. I understand that the coverage is offered to me and my Eligible Dependents.

Next

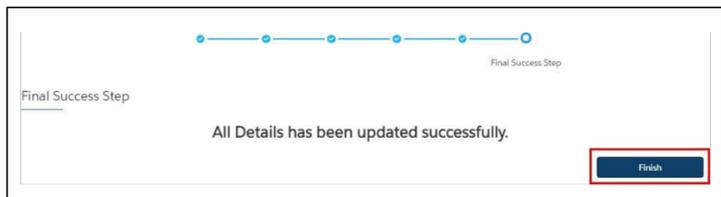
After completing all selections, you will have the opportunity to review your selections.

1. If you'd like to edit selections, click **Edit** at the top of the screen. Please note that selecting this option will lead you to the first election opportunity.
2. You may also click **Previous** to return to the previous screen.
3. After reviewing, click **Enroll**.



If all details have been updated successfully, you will receive a confirmation message on the next screen.

Click **Finish**.



Member Details Page

To view/edit Member Details, start on the group details page and scroll to the Members List at the bottom. The Member Details page will allow you to view member plan information, order ID Cards, update member demographics, process life events, terminate members, and make corrections.

To view a member's information, click on the arrow at the far right of the row under **Actions** and select **Member Details**.

Members Add Subscriber			
MEMBER NAME	DOB	STATUS	ACTIONS
Shawn Wilson Sr.	03/15/1983		▼
Darry Wilson Sr.	03/25/1987		▼
Jenny A Rowland sr		Enrolled	▼
Adam Smith	05/07/2006		▼
Ella Purnell	07/01/2021		▼
Rio Willsane	05/13/2021		Member Details Edit Member Details Edit Group/Subgroup
Tommy Will	05/14/2021		
Benefit Admin	05/10/1989		

On the **Member Details** page, you can view:

1. Any pending changes that have been made
2. Pending plans
3. Current plans/enrollment information
4. Demographic information
5. Information about dependents

You can also update member details from this page by clicking **Update Member**.

Bob Robin View Charges ¹

Pending Plans Update Plans ²

PLAN NAME	PLAN TYPE	COVERAGE	START DATE	END DATE	YOUR COST	EMPLOYER COST	WHO IS COVERED?	ACTIONS
Plus 1000/20%	Medical	Employee + Child	08/02/2022	08/01/2023	\$0.00			▼

Current Plans Update Plans ³

PLAN NAME	PLAN TYPE	COVERAGE	START DATE	END DATE	YOUR COST	EMPLOYER COST	WHO IS COVERED?	ACTIONS
Plus 1000/20%	Medical	Employee + Children	08/09/2021	08/01/2022	\$280.00	\$0.00	Pinto Robin, Anne Jones, Raipn	▼

Demographics Update Member ⁴

Member Details

Name	DOB	Gender
Bob Robin	08/08/1991	Male

Mailing address

Street Name	City	State	Zip Code	Phone Number	Email Address
1234	east main street	Chicago	23456	(258) 744-3717	bobrob@test.com

Dependents Update Dependents ⁵

DEPENDENT NAME	DOB	ADDRESS	RELATIONSHIP	GENDER	ACTIONS
Pinto Robin	08/25/1998	1234, Chicago, east main street, 23456	Other Dependent	Female	▼
Anne Jones	08/10/2010	1234, Chicago, east main street, 23456	Child	Female	▼
Raipn Robin	08/11/2021	1234, Chicago, east main street, 23456	Child	Male	▼
Anne Jones	08/12/2010	1234, Chicago, east main street, 23456	Child	Female	▼
Kelly Robin	08/07/1996	1234, Chicago, east main street, 23456	Disabled Child	Female	▼

Update Member

The option to make any updates to member can be found on the Member Details page by selecting "Update Member". The Update Member option will allow you to update member demographics, perform life events, and process terminations and corrections.

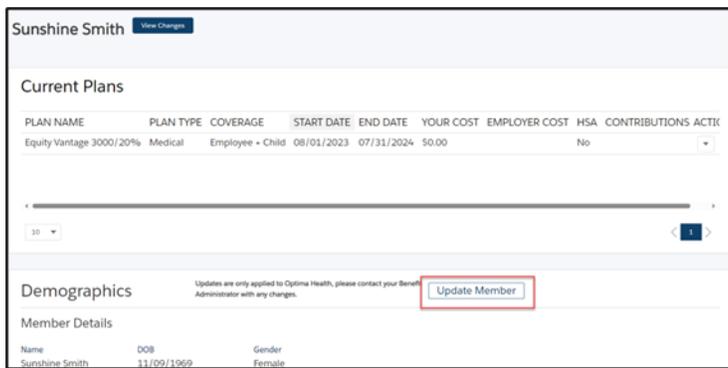
Start on the Group Details page and scroll to the **Members** section at the bottom.

Open a specific member page by using the drop down arrow under "actions" to the right of the member name. Select "**member details**" to navigate to the member details page.



MEMBER NAME	DOB	STATUS	ACTIONS
Shawn Wilson Sr.	03/15/1983		▼
Darry Wilson Sr.	03/25/1987		▼
Jenny A Rowland sr		Enrolled	▼
Adam Smith	05/07/2006		▼
Ella Purnell	07/01/2021		▼
Rio Willsane	05/13/2021		▼
Tommy Will	05/14/2021		▼
Benefit Admin	05/10/1989		▼

On the Member Details page, select the option for "Update Member".



Sunshine Smith View Changes

Current Plans

PLAN NAME	PLAN TYPE	COVERAGE	START DATE	END DATE	YOUR COST	EMPLOYER COST	HSA	CONTRIBUTIONS	ACTI
Equity Vantage 3000/20%	Medical	Employee + Child	08/01/2023	07/31/2024	50.00		No		▼

Demographics Updates are only applied to Optima Health, please contact your Benefit Administrator with any changes.

Update Member

Member Details

Name	DOB	Gender
Sunshine Smith	11/09/1969	Female

After clicking **Update Member**, a new window opens. Select **Update Member** to update the member demographics. Click **Next**.



What would you like to do?

What would you like to do?

Update Member
 DR Event
 Other Correction

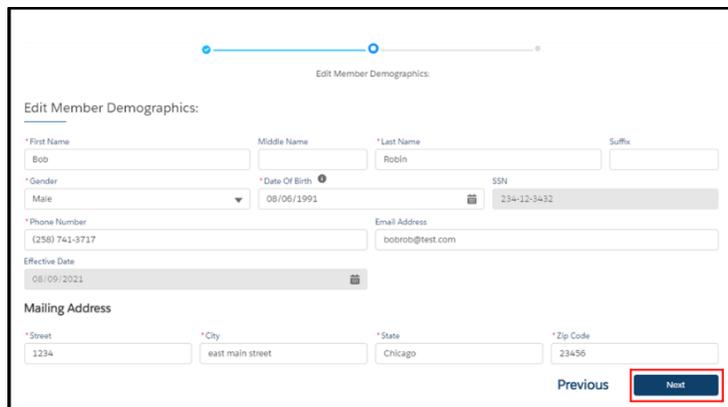
Next

The **Edit Member Demographics** page displays.

Editable member information is featured in white blocks on the screen. Grayed out blocks of information are not editable.

Note: You cannot edit the SSN nor the Effective Date. You must send an email request to e3_inquiries@sentara.com to have these fields changed.

Once you have completed your edits, click **Next**.



Edit Member Demographics:

*First Name: Bob Middle Name: Last Name: Robin Suffix:

*Gender: Male *Date of Birth: 08/06/1991 SSN: 234-12-3432

*Phone Number: (258) 741-3717 Email Address: bobrob@test.com

Effective Date: 08/09/2021

Mailing Address

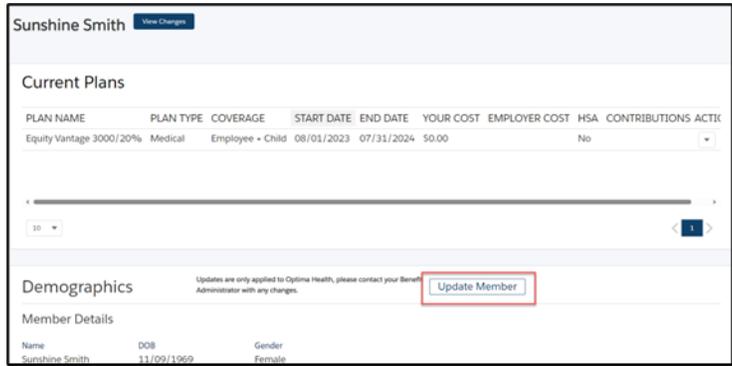
*Street: 1234 *City: east main street *State: Chicago *Zip Code: 23456

Previous **Next**

Life Events

Life events can be made through the “update member” option on the Member Details page. Examples of life events are birth, adoption, divorce, and termination of all coverage.

On the **Member Demographics** page, to make edits due to a **Life Event**, click **Update Member**.



Sunshine Smith [View Changes](#)

Current Plans

PLAN NAME	PLAN TYPE	COVERAGE	START DATE	END DATE	YOUR COST	EMPLOYER COST	HSA	CONTRIBUTIONS ACTI
Equity Vantage 3000/20%	Medical	Employee + Child	08/01/2023	07/31/2024	50.00		No	

Demographics Updates are only applied to Optima Health, please contact your Benefit Administrator with any changes. [Update Member](#)

Member Details

Name	DOB	Gender
Sunshine Smith	11/09/1999	Female

After clicking **Update Member**, a pop-up window appears.

Select **Life Event** to make edits and then click **Next**.



What would you like to do?

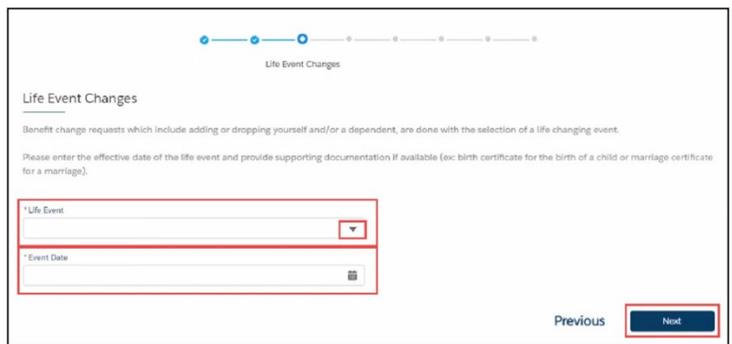
What would you like to do?

- Update Member
- Life Event
- Other Correction

[Next](#)

Select the applicable **Life Event** from the dropdown menu, provide the **Date of the Event**.

Note: **Life Events** can add and remove coverage for the member or their dependents, depending on the event selected.



Life Event Changes

Benefit change requests which include adding or dropping yourself and/or a dependent, are done with the selection of a life changing event.

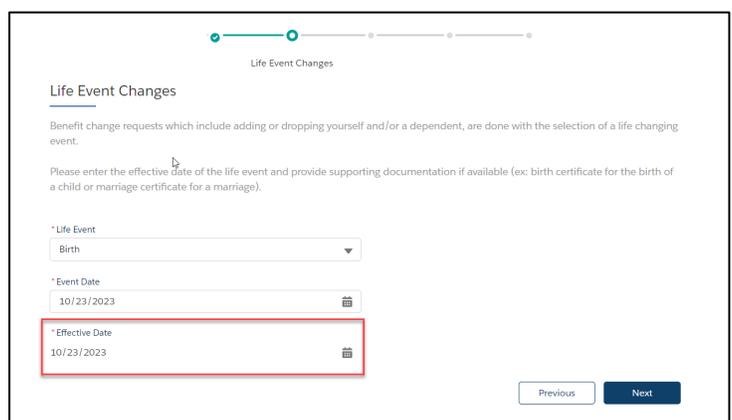
Please enter the effective date of the life event and provide supporting documentation if available (ex: birth certificate for the birth of a child or marriage certificate for a marriage).

* Life Event:

* Event Date:

[Previous](#) [Next](#)

Once you choose the **Life Event** and the **Date of the Event**, the **Effective Date** auto-populates. Click **Next**.



Life Event Changes

Benefit change requests which include adding or dropping yourself and/or a dependent, are done with the selection of a life changing event.

Please enter the effective date of the life event and provide supporting documentation if available (ex: birth certificate for the birth of a child or marriage certificate for a marriage).

* Life Event:

* Event Date:

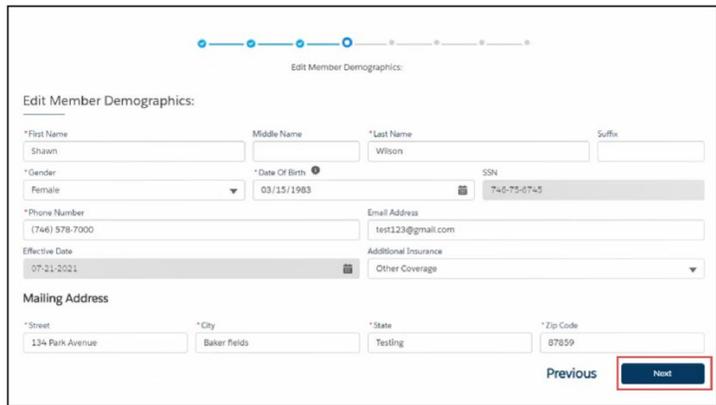
* Effective Date:

[Previous](#) [Next](#)

Review member information and make edits as needed. Editable member information is featured in white blocks on the screen.

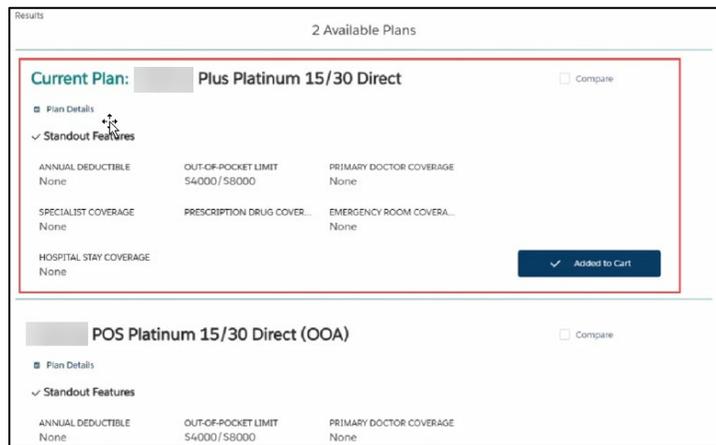
Note: To make changes to the grayed-out blocks, please send an email request to e3_inquiries@sentara.com.

Once you have completed your edits, click **Next**.



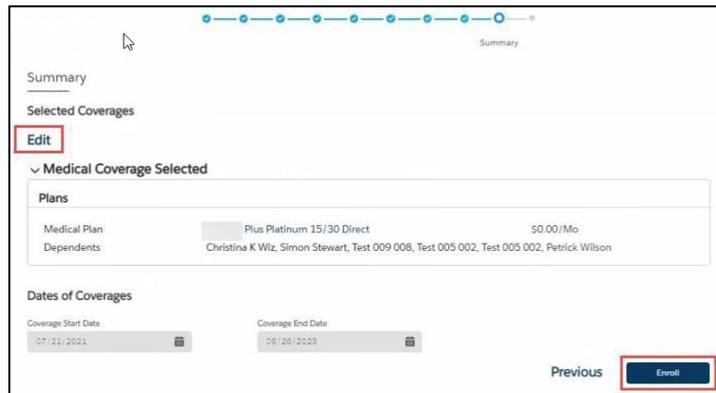
Review and update any relevant dependent information and click **Next**. Then, select the plan by clicking **Add to Cart**.

Note: The only difference with this experience is that you will see the member's current plan above the other available plans.



After completing the process of plan selection, review the plans. If changes are needed, click **Edit**.

If the information and selections are correct, click **Enroll**.



If details have been updated successfully, a confirmation screen will appear. Click **Finish**.

You then return back to the **Member Demographic** page.

