



Sentara®
Health Plans

Portal User Guide

Revision History

Row #	Revision Date	Version	Revision Description
1	09/08/2021	1.0	First draft
2	09/18/2021	1.1	Comments Incorporated
3	09/24/2021	1.2	Added notes under Introduction and View/update On-Exchange application section
4	10/12/2022	1.3	Added section #2 IDM-Okta Integration
5	12/1/2022	1.4	Added Agent ID Proofing
6	07/05/2023	1.5	Edits regarding SBE and new screens incorporated
7	09/21/2023	1.6	Screenshots amended
8	09/25/2023	1.7	Added Managing Off-Exchange
9	09/30/2023	1.8	Edits regarding Off-Exchange screenshots
10	10/03/2023	1.9	Final edits
11	10/04/2023	2.0	Added screenshots for section 6
12	10/04/2023	2.1	Version shared with users
13	10/05/2023	2.2	Updated to Sentara Logo
14	10/10/2023	2.3	Updated based on feedback from Optima
15	10/11/2023	2.4	Updated section 5.3
16	11/01/2023	2.5	Updated with Sentara Health branding screenshots and added additional details in various sections

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1 Introduction

The On-Exchange enrollment process allows consumers and brokers to apply for and enroll in individual health insurance coverage through the Virginia State Based Exchange (SBE) marketplace.

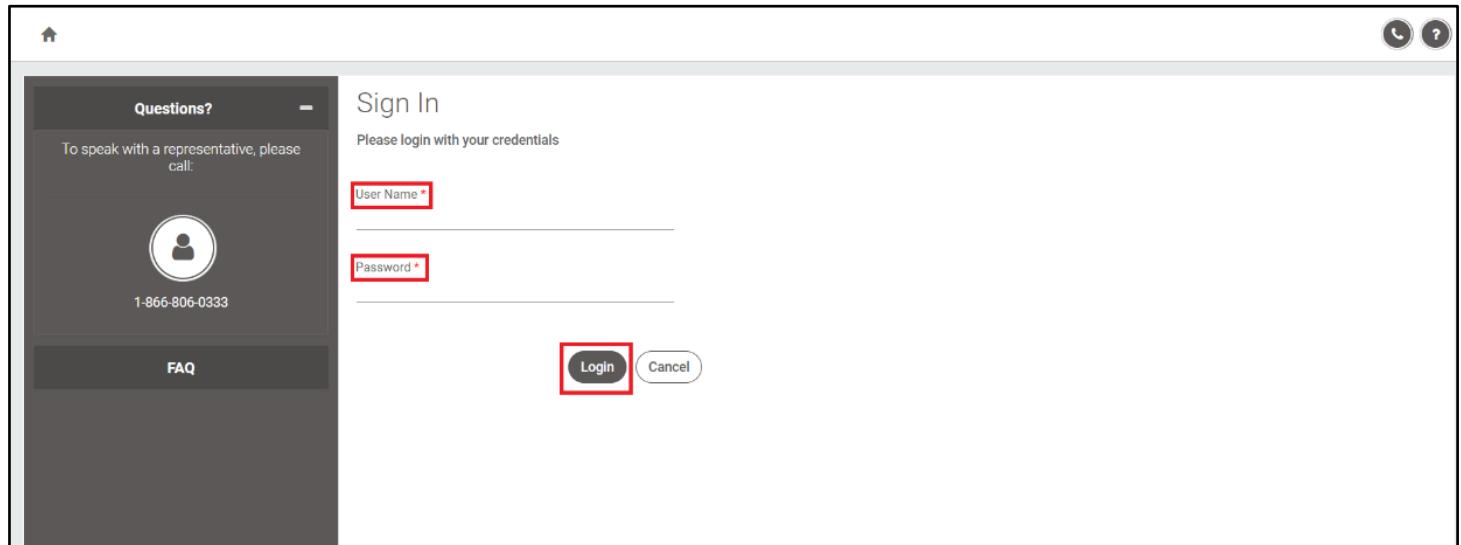
The Off-Exchange enrollment process allows consumers and brokers to apply for and enroll in individual health insurance coverage on the Portal. Enrollment on the Portal is for QHP Off-Exchange and Non-QHP plans only.

Users will be able to compare health insurance plans and create quotes for individuals and their dependents on the Portal before completing the enrollment on the SBE website (On-Exchange) or the Portal (Off-Exchange).

This user guide provides information about the On-Exchange enrollment and Off-Exchange enrollment and benefits management process for agents/brokers.

2 Login Screen

The Sentara users will be able to login to the portal by using the Optima Portal link that was shared through the welcome email. Whereas, the brokers will continue to follow the current way of logging in from the Sentara main website using the SSO username and password.



The screenshot shows the login interface of the Sentara Health Plans Portal. On the left, there is a sidebar with a 'Questions?' button, a phone icon, and a 'FAQ' button. The main area is titled 'Sign In' with the sub-instruction 'Please login with your credentials'. It features two input fields: 'User Name *' and 'Password *', both of which are highlighted with a red border. Below these fields are two buttons: 'Login' (which is also highlighted with a red border) and 'Cancel'.

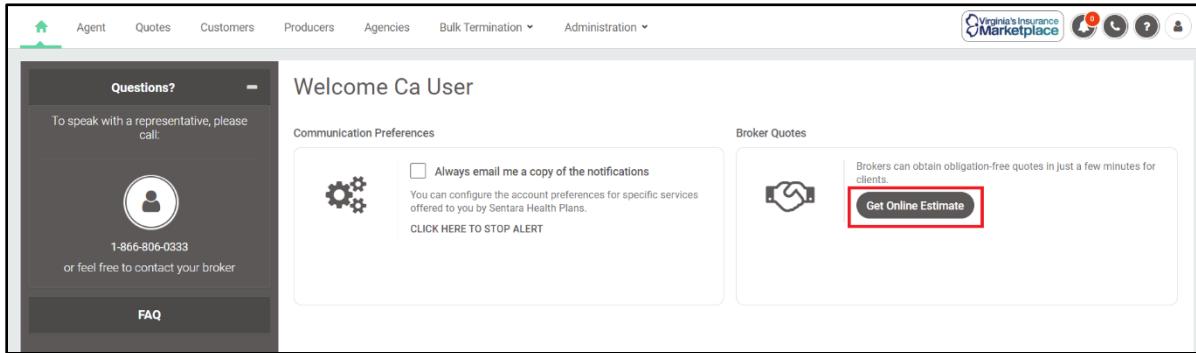
3 Quoting and Enrollment (On-Exchange)

The section below provides step-by-step, easy-to-follow instructions for creating quotes and completing the enrollment process.

3.1 Start Quoting Process

Log in to the Sentara Health Plans Portal using the login credentials. User will be navigated to Home page.

Start the quoting process by clicking the **Get Online Estimate** button highlighted in the below screenshot.



You will be navigated to the **Basics** information entry screen, where you enter the basic information to start building a profile for the customer who needs coverage. Enter the customer's home zip code and the effective date from when the customer wants the coverage to be effective. Enter the primary applicant's Gender, Date of Birth and tobacco usage. For details on how to add/remove basic demographic information about the child and spouse, please refer to sections 3.2 and 3.3, respectively. Also, household size and income could potentially help you find out the subsidy eligibility.

Sentara Health Plans

Basics

Please enter your coverage location details *

Zip Code *

When would you like your coverage to start? *

Open Enrollment for 2024 runs from November 1, 2023 to January 15, 2024.

12/01/2023 01/01/2024 02/01/2024

Who needs coverage?

Applicant Gender * Choose Your Option Date of Birth * MM/DD/YYYY Tobacco User * No

If you want a child-only plan, make sure the applicant's age is less than 18 & the dependent's (if any) age is at least 18 or less.

Let's see whether you are eligible for monthly cost savings! (optional)

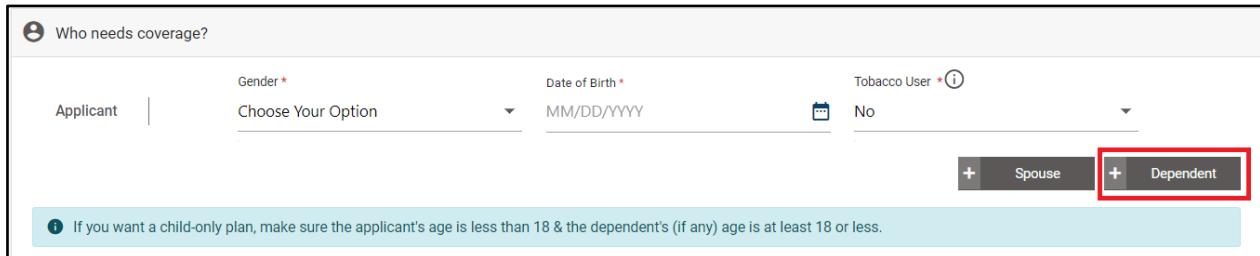
Household Size 1 Household Income

Cancel See Plans

3.2 Add Dependent

Follow below steps to add or remove dependents to the coverage in the basic information capture screen detailed out in section 3.1.

Click on the **+Dependent** button.



The screenshot shows the 'Who needs coverage?' section of a form. At the top, there is a question 'Who needs coverage?' with a person icon. Below it, there are fields for 'Applicant': 'Gender *' (dropdown menu 'Choose Your Option'), 'Date of Birth *' (text input 'MM/DD/YYYY'), and 'Tobacco User *' (dropdown menu 'No'). At the bottom of the section, there are two buttons: '+ Spouse' and '+ Dependent'. The '+ Dependent' button is highlighted with a red box. A note at the bottom of the section states: 'If you want a child-only plan, make sure the applicant's age is less than 18 & the dependent's (if any) age is at least 18 or less.'

The application displays **Dependent** section as in the below screenshot. Enter the required dependent information. You can add any number of dependents by clicking **+ Dependent** button. In case if you choose to remove the newly added dependent, click on the **-Remove** button.

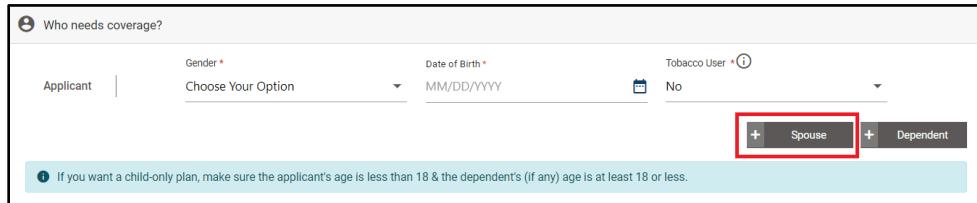


The screenshot shows the 'Who needs coverage?' section of a form. It includes fields for 'Applicant' and 'Dependent'. For 'Applicant', there are 'Gender *' (dropdown 'Choose Your Option'), 'Date of Birth *' (text input 'MM/DD/YYYY'), and 'Tobacco User *' (dropdown 'No'). For 'Dependent', there are similar fields: 'Gender *' (dropdown 'Choose Your Option'), 'Date of Birth *' (text input 'MM/DD/YYYY'), and 'Tobacco User *' (dropdown 'No'). At the bottom right, there is a red box around a 'Remove' button. A note at the bottom of the section states: 'If you want a child-only plan, make sure the applicant's age is less than 18 & the dependent's (if any) age is at least 18 or less.'

3.3 Add Spouse

Follow below steps to add or remove a spouse to the coverage in the basic information capture screen detailed out in section 3.1.

Click the **+Spouse** button. The application displays **Add Spouse** section.



The screenshot shows the 'Who needs coverage?' section of an application. It includes fields for 'Applicant' (Gender: Choose Your Option, Date of Birth: MM/DD/YYYY, Tobacco User: No), and a 'Spouse' section (Gender: Choose Your Option, Date of Birth: MM/DD/YYYY, Tobacco User: No). Below these sections are buttons for '+ Spouse' and '+ Dependent'. The '+ Spouse' button is highlighted with a red box. A note at the bottom states: 'If you want a child-only plan, make sure the applicant's age is less than 18 & the dependent's (if any) age is at least 18 or less.'

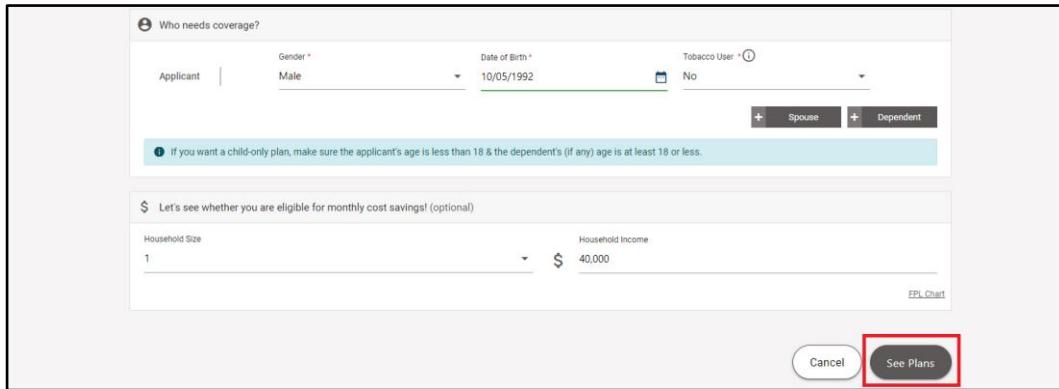
The application displays **Spouse** section as in the below screenshot. Enter the required spouse information. Enter the required information to add a spouse. Click the **-Remove** button if the user wants to remove spouse details.



The screenshot shows the 'Who needs coverage?' section of an application. It includes fields for 'Applicant' (Gender: Choose Your Option, Date of Birth: MM/DD/YYYY, Tobacco User: No) and 'Spouse' (Gender: Choose Your Option, Date of Birth: MM/DD/YYYY, Tobacco User: No). Below these sections are buttons for '+ Spouse' and '+ Dependent'. The '+ Spouse' button is highlighted with a red box. A note at the bottom states: 'If you want a child-only plan, make sure the applicant's age is less than 18 & the dependent's (if any) age is at least 18 or less.' A red box highlights the '- Remove' button in the 'Spouse' section.

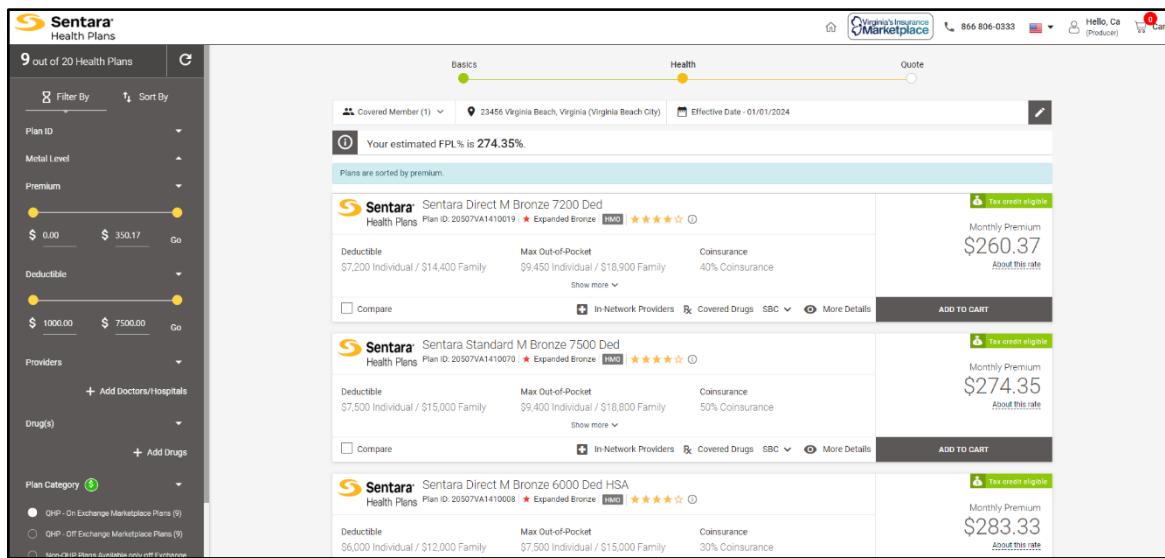
3.4 View Available Plans

After adding the Spouse/Dependent details and entering data for all required fields in the **Basics** section, Click **See Plans** button to view all the available plans.



The screenshot shows a user interface for entering coverage details. At the top, it asks 'Who needs coverage?' with fields for 'Applicant' (Gender: Male, Date of Birth: 10/05/1992, Tobacco User: No), 'Spouse' (+), and 'Dependent' (+). A note says 'If you want a child-only plan, make sure the applicant's age is less than 18 & the dependent's (if any) age is at least 18 or less.' Below this, a section for 'Monthly cost savings!' asks for 'Household Size' (1) and 'Household Income' (\$ 40,000). At the bottom right are 'Cancel' and 'See Plans' buttons, with 'See Plans' being the one highlighted by a red box.

The application displays plan details as shown below.

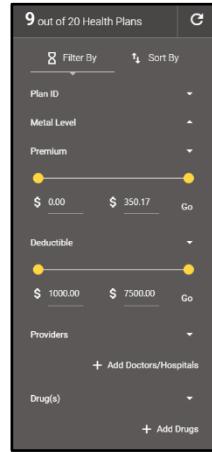


The screenshot shows a list of 9 out of 20 available health plans. The interface includes a sidebar with filters for 'Plan ID', 'Metal Level' (Premium), 'Premium' (range from \$ 0.00 to \$ 350.17), 'Deductible' (range from \$ 1000.00 to \$ 7500.00), 'Providers', 'Drug(s)', and 'Plan Category'. The main area displays three plan details: 1. Sentara Direct M Bronze 7200 Ded Health Plans (Plan ID: 20507VA1410019, *Expanded Bronze, HMO, 4.5 stars) with a monthly premium of \$260.37. 2. Sentara Standard M Bronze 7500 Ded Health Plans (Plan ID: 20507VA1410070, *Expanded Bronze, HMO, 4.5 stars) with a monthly premium of \$274.35. 3. Sentara Direct M Bronze 6000 Ded HSA Health Plans (Plan ID: 20507VA1410009, *Expanded Bronze, HMO, 4.5 stars) with a monthly premium of \$283.33. Each plan row includes 'Compare', 'In Network Providers', 'Covered Drugs', 'SBC', 'More Details', and 'ADD TO CART' buttons. The 'See Plans' button in the top right corner is highlighted with a red box.

3.5 Sort and Filter Plans

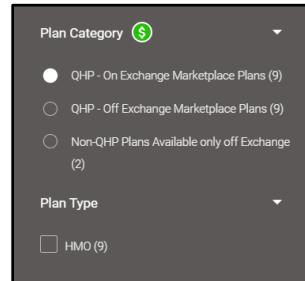
You can filter plans by using **Filter By** or **Sort By** options in the left pane of the plans page.

Sort and Filter options are available in the left pane of the plans screen.



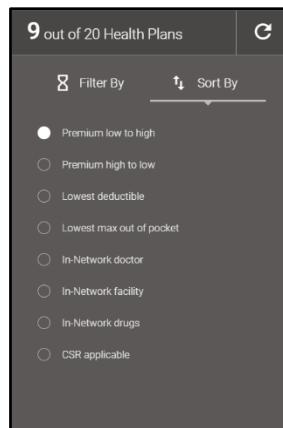
User can select different types of filtering as per the requirement.

Choose the **Plan Category** (QHP On-Exchange/QHP-Off-Exchange/Non-QHP plans)



The application shows **Filter By** option by default.

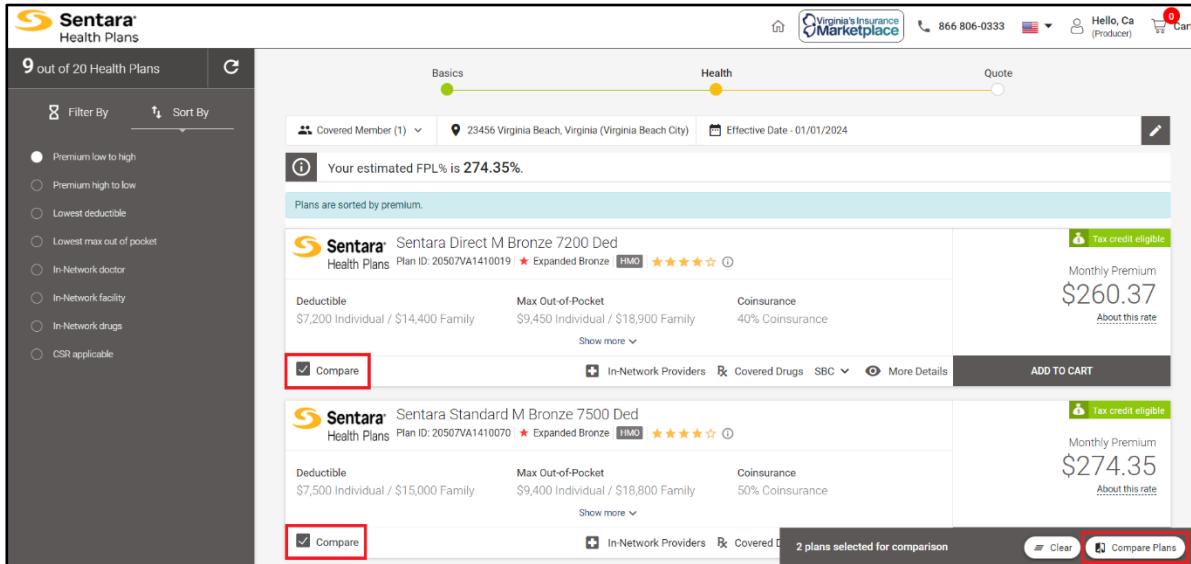
Click **Sort By** to sort the plans as per the requirement.



3.6 Compare Plans

You can compare different plans by selecting the specific plan and then clicking the **Compare** button.

Click on the **Compare** checkbox corresponding to the list of plans that you want to compare. Then, click **Compare Plans** button to compare the plans.



9 out of 20 Health Plans

Basics Health Quote

Covered Member (1) 23456 Virginia Beach, Virginia (Virginia Beach City) Effective Date - 01/01/2024

Your estimated FPL% is 274.35%.

Plans are sorted by premium.

Sentara Direct M Bronze 7200 Ded
Health Plans Plan ID: 20507VA1410019 ★ Expanded Bronze HMO ★★★★☆ ⓘ

Deductible: \$7,200 Individual / \$14,400 Family Max Out-of-Pocket: \$9,450 Individual / \$18,900 Family Coinsurance: 40% Coinsurance

Compare

Sentara Standard M Bronze 7500 Ded
Health Plans Plan ID: 20507VA1410070 ★ Expanded Bronze HMO ★★★★☆ ⓘ

Deductible: \$7,500 Individual / \$15,000 Family Max Out-of-Pocket: \$9,400 Individual / \$18,800 Family Coinsurance: 50% Coinsurance

Compare

ADD TO CART

Tax credit eligible

Monthly Premium: \$260.37 About this rate

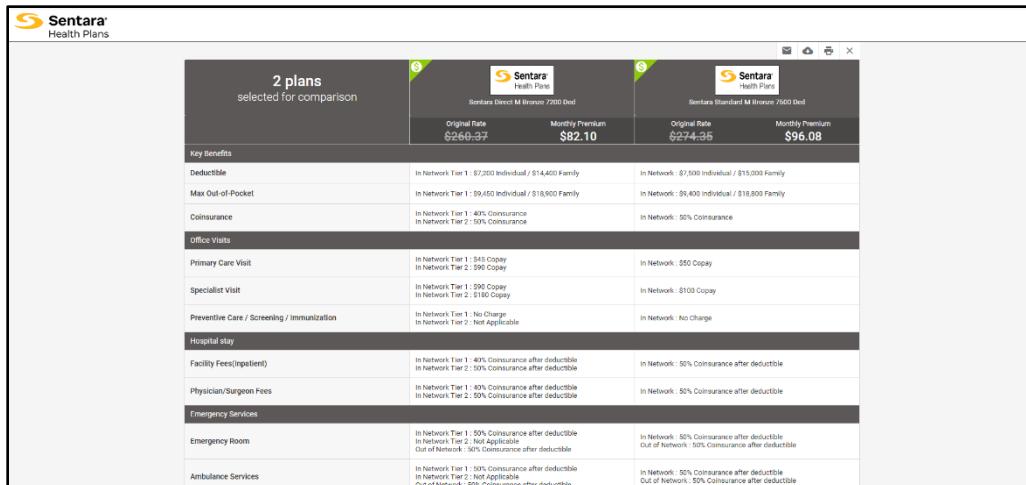
Tax credit eligible

Monthly Premium: \$274.35 About this rate

2 plans selected for comparison

Clear Compare Plans

The application displays the Plans Compare page as shown below.



2 plans selected for comparison

	Sentara Direct M Bronze 7200 Ded	Sentara Standard M Bronze 7500 Ded
Original Rate	\$260.37	\$274.35
Monthly Premium	\$82.10	\$96.08
Key Benefits		
Deductible	In Network: \$7,200 Individual / \$14,400 Family	In Network: \$7,500 Individual / \$15,000 Family
Max Out-of-Pocket	In Network: \$9,450 Individual / \$18,900 Family	In Network: \$9,400 Individual / \$18,800 Family
Coinurance	In Network: 40% Coinsurance	In Network: 50% Coinsurance
Office Visits		
Primary Care Visit	In Network Tier 1: \$45 Copay In Network Tier 2: \$90 Copay	In Network: \$50 Copay
Specialist Visit	In Network Tier 1: \$90 Copay In Network Tier 2: \$180 Copay	In Network: \$100 Copay
Preventive Care / Screening / Immunization	In Network Tier 1: No Charge In Network Tier 2: Not Applicable	In Network: No Charge
Hospital stay		
Facility Fees (Inpatient)	In Network Tier 1: 40% Coinsurance after deductible In Network Tier 2: 50% Coinsurance after deductible	In Network: 50% Coinsurance after deductible
Physician/Surgeon Fees	In Network Tier 1: 40% Coinsurance after deductible In Network Tier 2: 50% Coinsurance after deductible	In Network: 50% Coinsurance after deductible
Emergency Services		
Emergency Room	In Network Tier 1: 50% Coinsurance after deductible In Network Tier 2: Not Applicable Out of Network: 50% Coinsurance after deductible	In Network: 50% Coinsurance after deductible Out of Network: 50% Coinsurance after deductible
Ambulance Services	In Network Tier 1: 50% Coinsurance after deductible In Network Tier 2: Not Applicable Out of Network: 50% Coinsurance after deductible	In Network: 50% Coinsurance after deductible Out of Network: 50% Coinsurance after deductible

You can perform a few sets of actions to get access to the plan comparison information (refer to the below screenshot) -

- Click the **Email** icon and enter the email in the pop-up to receive a PDF file of the comparison of plans.
- Click the **Download** icon to get a PDF file of the comparison of plans.
- Click the **Print** icon to print a PDF file of the comparison of plans.
- Click the **Close** icon to exit the plan comparison screen.

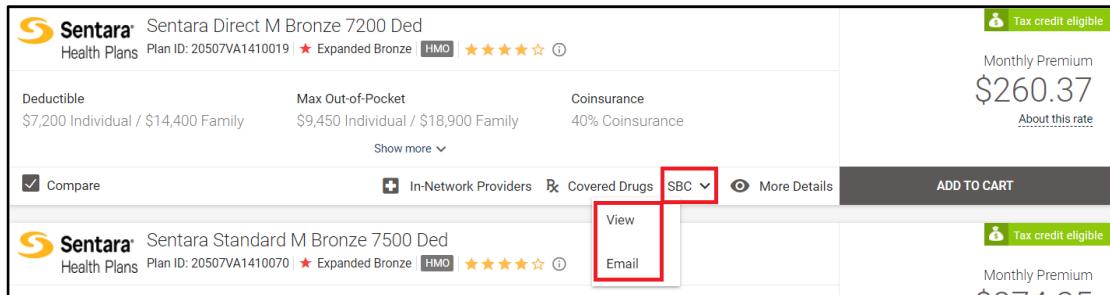


2 plans selected for comparison	\$ Sentara Direct M Bronze 7200 Ded	\$ Sentara Standard M Bronze 7500 Ded
	Original Rate \$260.37	Original Rate \$274.35

Key Benefits

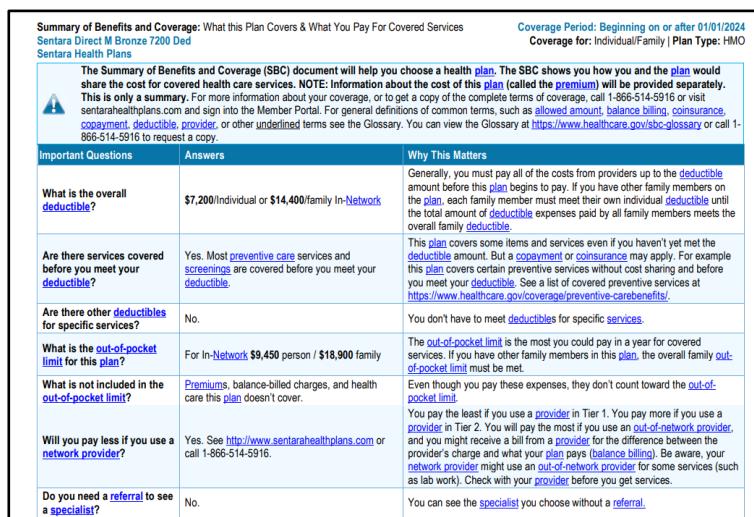
3.7 View Summary of Benefits Coverage (SBC)

Click the **SBC** button to view or email the summary of benefits and coverage details.



The screenshot shows two plan options from Sentara Health Plans. The first plan is the Sentara Direct M Bronze 7200 Ded, with a monthly premium of \$260.37. The second plan is the Sentara Standard M Bronze 7500 Ded, with a monthly premium of \$267.40. Both plans are HMOs with 4 stars. The 'SBC' button is highlighted with a red box on the second plan's page.

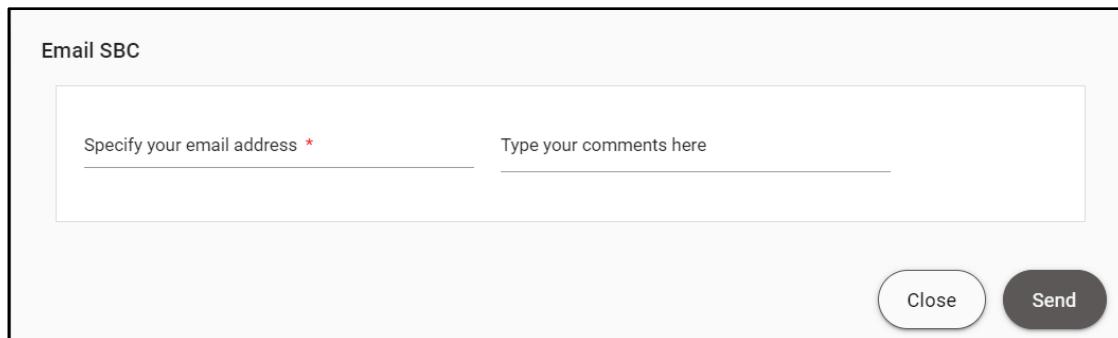
When the **View** button is clicked, a PDF file is opened explaining the Summary of Benefits and Coverage (SBC).



The screenshot shows the Summary of Benefits and Coverage (SBC) document. It includes a note about the plan's coverage and cost sharing, followed by a table with questions and answers. The table has three columns: Important Questions, Answers, and Why This Matters.

Important Questions	Answers	Why This Matters
What is the overall deductible?	\$7,200/individual or \$14,400/family In Network	Generally, you must pay all of the costs from providers up to the deductible amount before this plan begins to pay. If you have other family members on the plan, each family member must meet their own individual deductible until the total amount of deductible expenses paid by all family members meets the overall family deductible.
Are there services covered before you meet your deductible?	Yes. Most preventive care services and screenings are covered before you meet your deductible.	This plan covers some items and services even if you haven't yet met the deductible amount. But a copay or coinsurance may apply. For example this plan covers certain preventive services without cost sharing and before you meet your deductible. See a list of covered preventive services at https://www.healthcare.gov/coverage/preventive-carebenefits/ .
Are there other deductibles for specific services?	No.	You don't have to meet deductibles for specific services.
What is the out-of-pocket limit for this plan?	For In-Network \$9,450 person / \$18,900 family	The out-of-pocket limit is the most you could pay in a year for covered services. If you have other family members in this plan, the overall family out-of-pocket limit must be met.
What is not included in the out-of-pocket limit?	Premiums, balance-billed charges, and health care this plan doesn't cover.	Even though you pay these expenses, they don't count toward the out-of-pocket limit.
Will you pay less if you use a network provider?	Yes. See http://www.sentarahealthplans.com or call 1-866-514-5916.	You pay the least if you use a provider in Tier 1. You pay more if you use a provider in Tier 2. You will pay the most if you use an out-of-network provider, and you might receive a bill from a provider for the difference between the provider's charge and what your plan pays (balance billing). Be aware, your network provider might use an out-of-network provider for some services (such as lab work). Check with your provider before you get services.
Do you need a referral to see a specialist?	No.	You can see the specialist you choose without a referral.

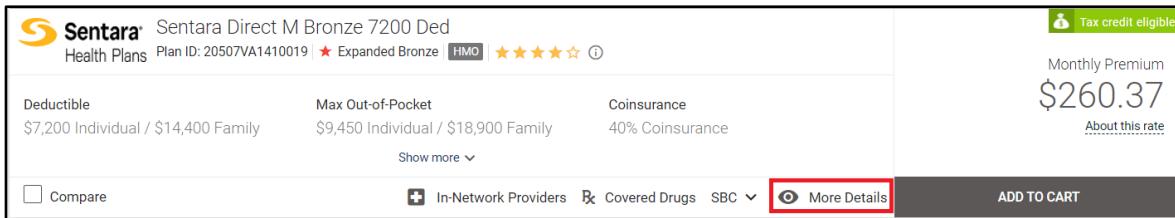
When the **Email** button is clicked, a pop-up shows up, allowing the user to enter their email address to send the SBC.



The screenshot shows the 'Email SBC' pop-up window. It has fields for 'Specify your email address' and 'Type your comments here'. There are 'Close' and 'Send' buttons at the bottom.

3.8 View Plan Details

Click on **More Details** button to view all the coverage information.



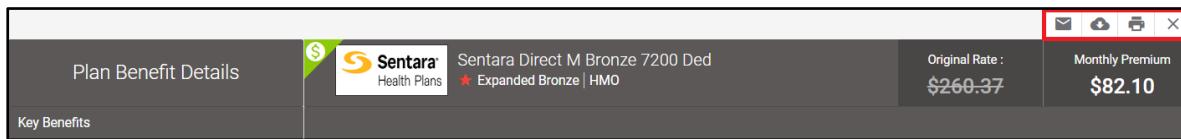
Sentara Sentara Direct M Bronze 7200 Ded
Health Plans Plan ID: 20507VA1410019 | ★ Expanded Bronze | HMO ★★★★★ ⓘ

Deductible: \$7,200 Individual / \$14,400 Family Max Out-of-Pocket: \$9,450 Individual / \$18,900 Family Coinsurance: 40% Coinsurance
Show more ▾

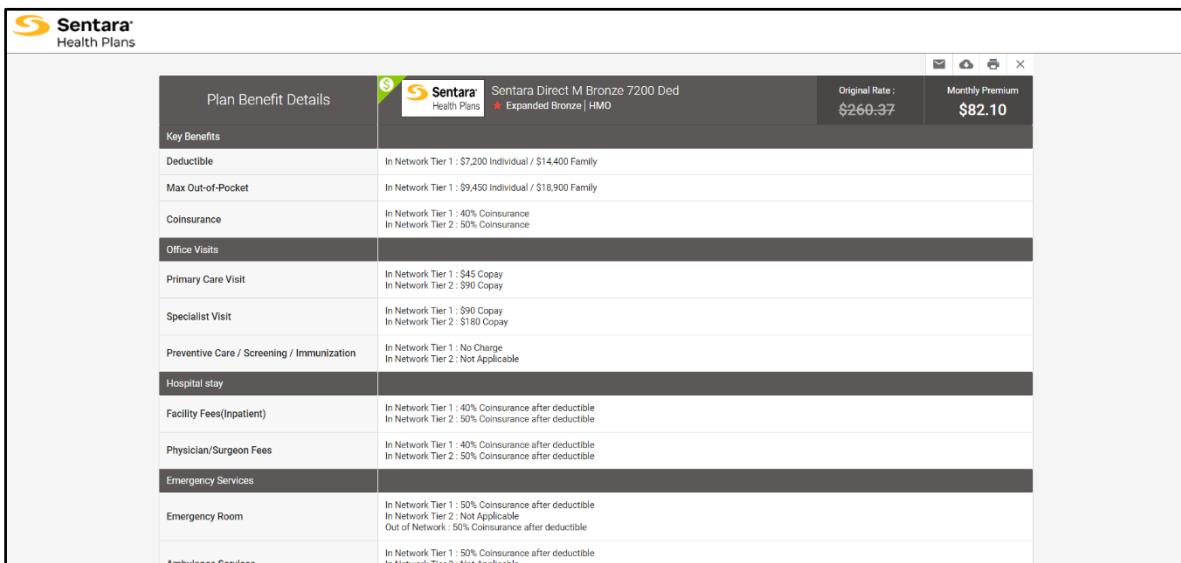
Compare In-Network Providers Covered Drugs SBC ▾ **More Details** ADD TO CART

Tax credit eligible
Monthly Premium
\$260.37
About this rate

In the **Plan Benefits Details** section, you can access the PDF using the icons on the upper right corner.

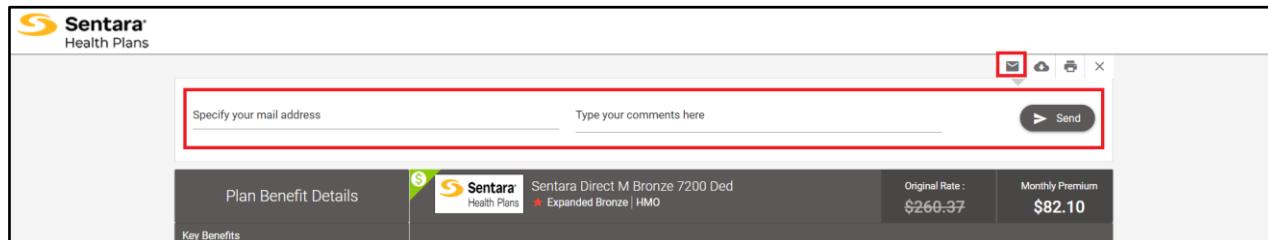


Plan Benefit Details	Sentara Health Plans	Sentara Direct M Bronze 7200 Ded ★ Expanded Bronze HMO	Original Rate : \$260.37	Monthly Premium \$82.10
Key Benefits				



Plan Benefit Details	Sentara Health Plans	Sentara Direct M Bronze 7200 Ded ★ Expanded Bronze HMO	Original Rate : \$260.37	Monthly Premium \$82.10
Key Benefits				
Deductible	In Network Tier 1 : \$7,200 Individual / \$14,400 Family			
Max Out-of-Pocket	In Network Tier 1 : \$9,450 Individual / \$18,900 Family			
Coinsurance	In Network Tier 1 : 40% Coinsurance In Network Tier 2 : 50% Coinsurance			
Office Visits				
Primary Care Visit	In Network Tier 1 : \$45 Copay In Network Tier 2 : \$90 Copay			
Specialist Visit	In Network Tier 1 : \$90 Copay In Network Tier 2 : \$180 Copay			
Preventive Care / Screening / Immunization	In Network Tier 1 : No Charge In Network Tier 2 : Not Applicable			
Hospital stay				
Facility Fees(Inpatient)	In Network Tier 1 : 40% Coinsurance after deductible In Network Tier 2 : 50% Coinsurance after deductible			
Physician/Surgeon Fees	In Network Tier 1 : 40% Coinsurance after deductible In Network Tier 2 : 50% Coinsurance after deductible			
Emergency Services				
Emergency Room	In Network Tier 1 : 50% Coinsurance after deductible In Network Tier 2 : Not Applicable Out of Network : 50% Coinsurance after deductible			
Ambulance Services	In Network Tier 1 : 50% Coinsurance after deductible In Network Tier 2 : Not Applicable			

Click the **Email** icon to email the Plan Benefit Details to the specified email ID.



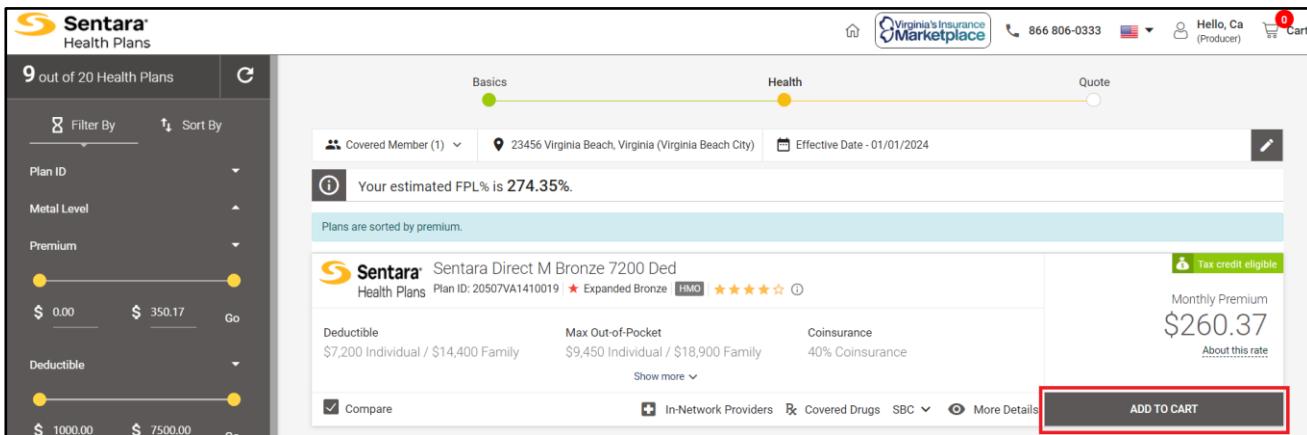
Click the **Download** icon to download the Plan Benefit Details.

Click the **Print** icon to print the Plan Benefit Details.

Click the **Close** icon to go back to the plans listing page.

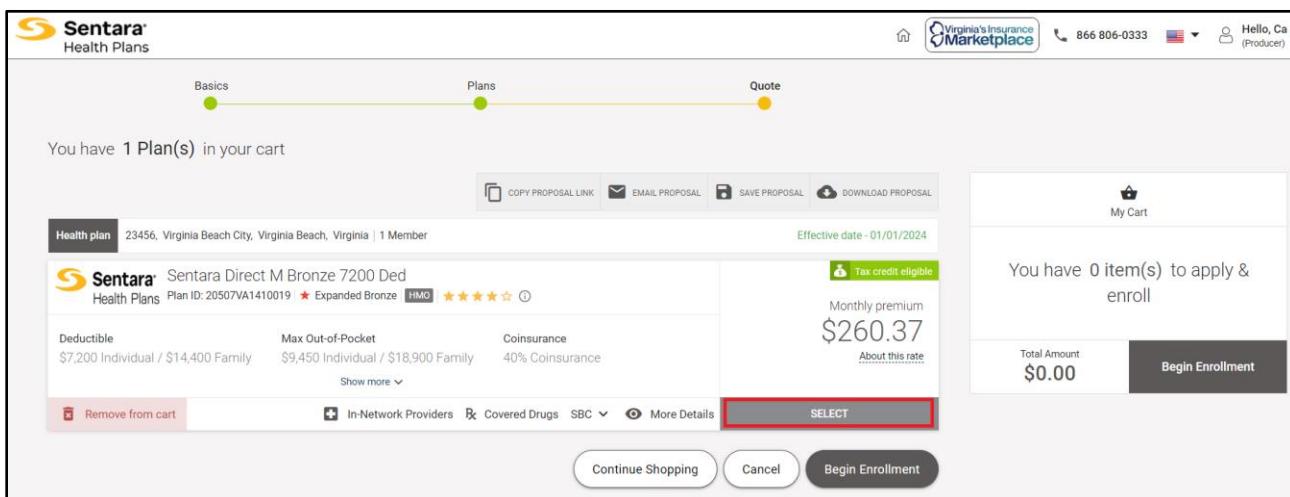
3.9 Plan Checkout to initiate enrollment process

On the **plan listing** page, click the **Add To Cart** button to add an applicable plan to the cart. Click the **Cart** icon to view all the plans added to the cart.



The screenshot shows the Sentara Health Plans portal. On the left, there is a sidebar with filters for 'Plan ID', 'Metal Level', 'Premium', and 'Deductible'. The main content area displays a plan from 'Sentara Health Plans' named 'Sentara Direct M Bronze 7200 Ded'. The plan details include: Deductible (\$7,200 Individual / \$14,400 Family), Max Out-of-Pocket (\$9,450 Individual / \$18,900 Family), and Coinsurance (40% Coinsurance). To the right, there is a summary box with a 'Tax credit eligible' badge, the monthly premium '\$260.37', and a 'About this rate' link. At the bottom right of this summary box is a grey button labeled 'ADD TO CART', which is highlighted with a red box.

To enroll in a plan, click the grey **Select** button to select the plan.

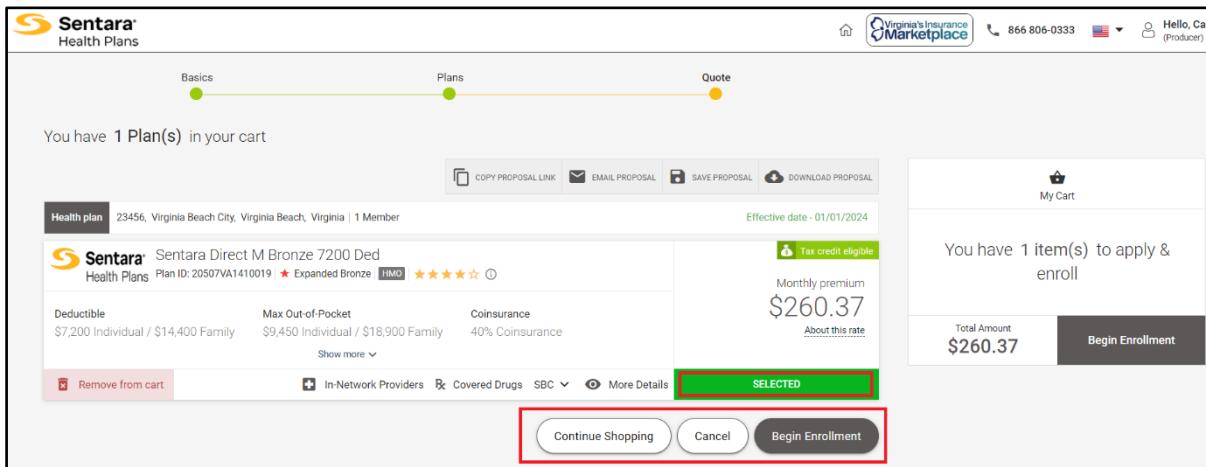


The screenshot shows the Sentara Health Plans portal. The top navigation bar includes the Sentara logo, a search bar, and links for 'Basics', 'Plans', and 'Quote'. Below this, a message says 'You have 1 Plan(s) in your cart'. The main content area shows the same 'Sentara Direct M Bronze 7200 Ded' plan as the previous screenshot. The 'SELECT' button at the bottom of the plan details is highlighted with a red box. To the right, there is a 'My Cart' section showing '0 item(s) to apply & enroll' and a 'Begin Enrollment' button. At the bottom, there are 'Continue Shopping', 'Cancel', and 'Begin Enrollment' buttons.

Click the **Cancel** button if the user wants to cancel the quoting.

Click the **Continue Shopping** button to go back to the plans section.

After the plan is selected, click the **Begin Enrollment** button to initiate enrollment process.



The system will display a popup to capture contact details of the primary applicant. Enter the required details and click on the **Save** button to continue.

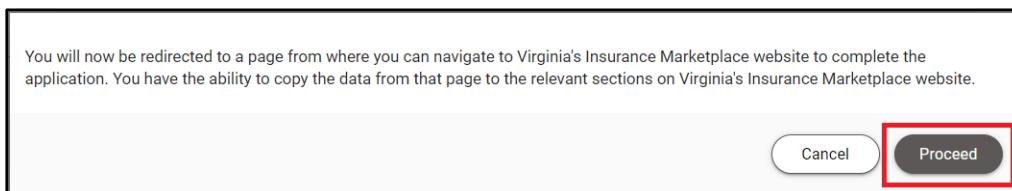
Enter Contact Details of Customer

First Name *	John	Last Name *	Smith
Gender *	Male	Date of Birth *	10/05/1992
Email Address	jsmith@gmail.com	Phone *	(913) 483-4702

By providing your information above, you agree that we may contact you at the phone number or email address you provide us (including on any partially or fully completed application). You may receive email messages, calls and texts as part of our marketing initiatives that includes telemarketing using an automated telephone dialing system. Agreeing to these terms is not a condition of purchase. Message and data rates may apply.

Save Close

The system will display the below informational popup. Click on the **Proceed** button to redirect to the **Application Details** screen.

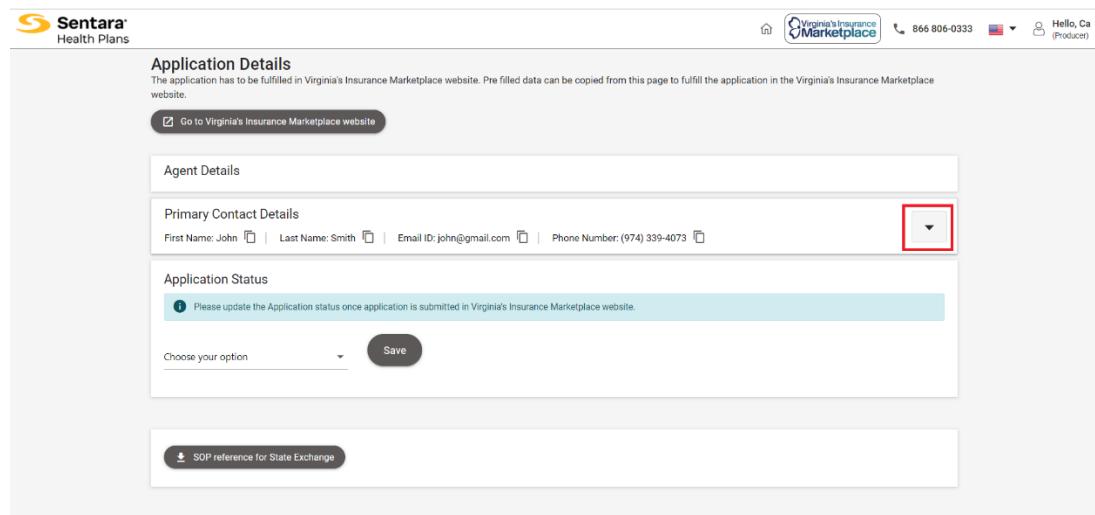


3.10 On-Exchange (State Based Exchange) Enrollment Process

Once the user clicks on the ‘Proceed’ button from section 3.9 above, you will be navigated to the enrollment information page as shown below. This is a landing page where all the information you entered so far gets displayed.

Important Note: To complete the actual enrollment, you will have to click on the ‘**Go to Virginia’s Insurance Marketplace Website**’ button shown in the below screen to navigate to Virginia’s Insurance Marketplace website. The system will open a new window with Virginia’s Insurance Marketplace website. The direct link for Virginia’s Insurance Marketplace website is: www.marketplace.virginia.gov. In order to avoid double data entry, you can copy paste all the information you have entered so far in the Sentara Portal into Virginia’s Insurance Marketplace by clicking the copy icon that’s present next to each field in the below screen.

Click on the arrow at the right side of the Primary contact details to expand to get ALL details entered. Please refer to the below two screenshots.



Application Details
The application has to be fulfilled in Virginia's Insurance Marketplace website. Pre filled data can be copied from this page to fulfill the application in the Virginia's Insurance Marketplace website.

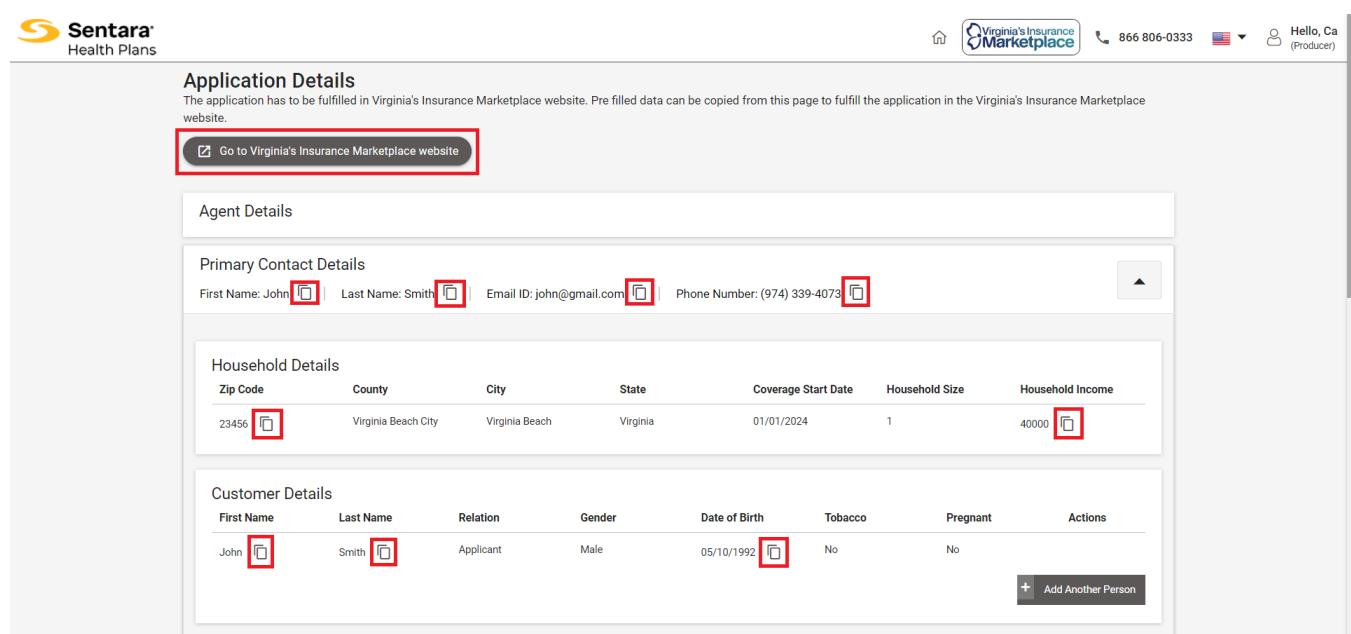
Go to Virginia's Insurance Marketplace website

Agent Details

Primary Contact Details
First Name: John | Last Name: Smith | Email ID: john@gmail.com | Phone Number: (974) 339-4073 ▼

Application Status
Please update the Application status once application is submitted in Virginia's Insurance Marketplace website.

Choose your option



Application Details
The application has to be fulfilled in Virginia's Insurance Marketplace website. Pre filled data can be copied from this page to fulfill the application in the Virginia's Insurance Marketplace website.

Go to Virginia's Insurance Marketplace website

Agent Details

Primary Contact Details
First Name: John | Last Name: Smith | Email ID: john@gmail.com | Phone Number: (974) 339-4073 ▼

Household Details

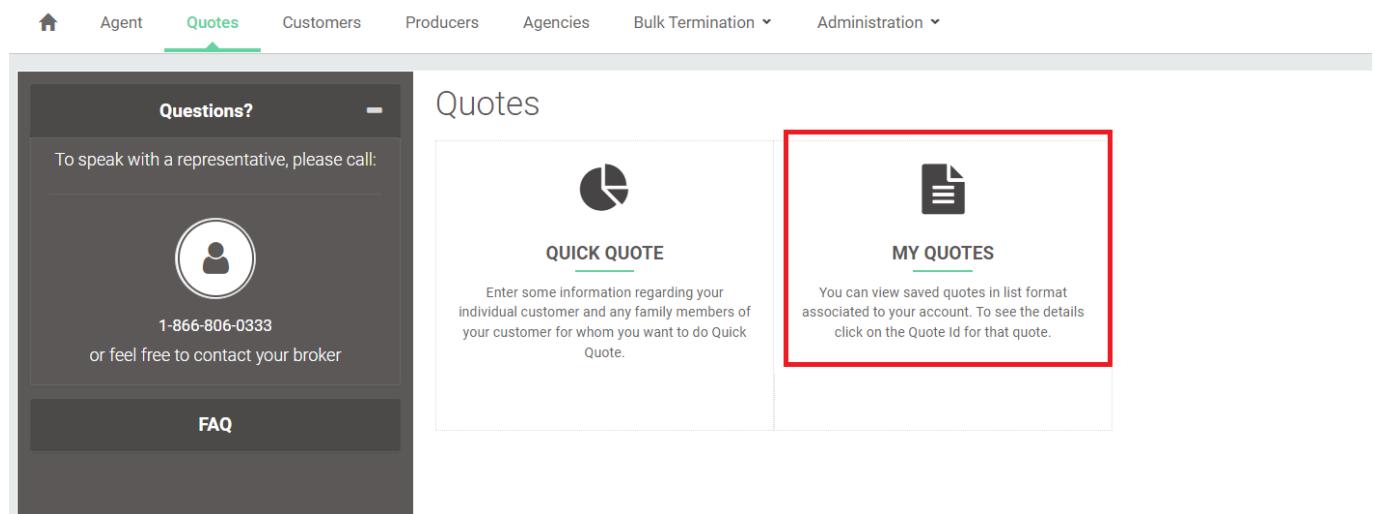
Zip Code	County	City	State	Coverage Start Date	Household Size	Household Income
23456 <input type="text"/>	Virginia Beach City	Virginia Beach	Virginia	01/01/2024	1	40000 <input type="text"/>

Customer Details

First Name	Last Name	Relation	Gender	Date of Birth	Tobacco	Pregnant	Actions
John <input type="text"/>	Smith <input type="text"/>	Applicant	Male	05/10/1992 <input type="text"/>	No	No	<input type="button" value="Add Another Person"/>

3.11 View Existing Quotes

Click on the top-level Quote menu. You will be navigated to below screen. Then click on the ‘My Quotes’ highlighted in the below screenshot.



You will be navigated to the My Quotes screen as in the below screenshot. The application displays the list of quotes created by the particular broker or Sentara users.

The screenshot shows the 'My Quotes' screen. The top navigation bar is identical to the previous one. The main content area is titled 'My Quotes' and displays a table of saved quotes. The table has columns for Id, Customer Name, Package Name, Status, Effective Date, and Created Date. The data in the table is as follows:

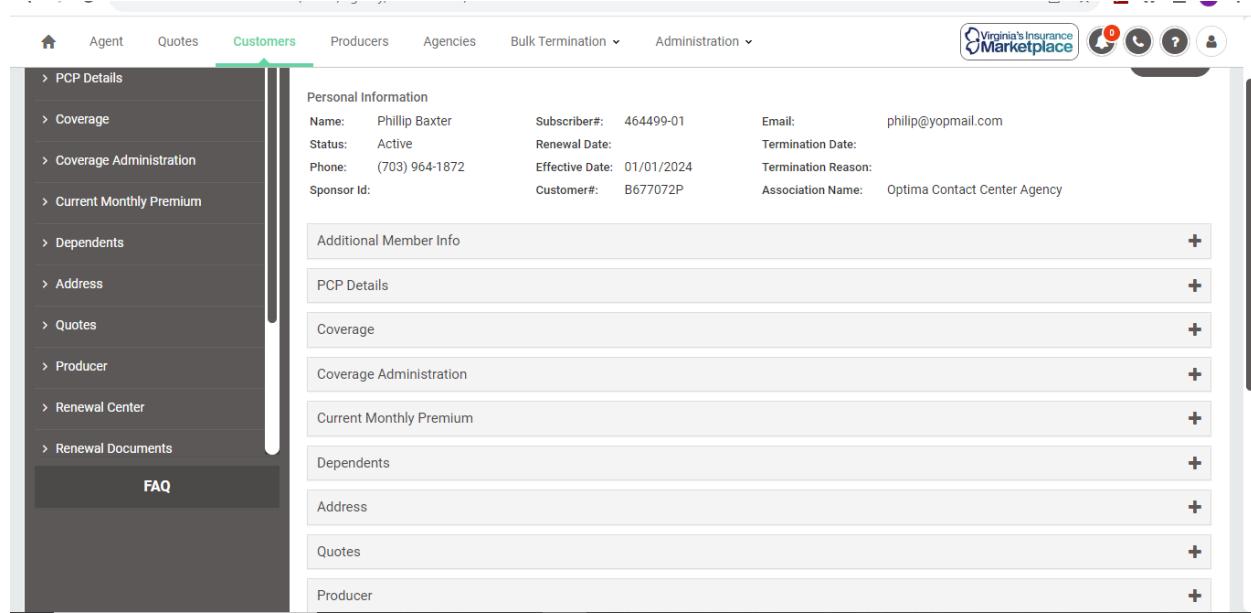
Id	Customer Name	Package Name	Status	Effective Date	Created Date
1059842	Manuel Test	Sentara Direct M Bronze 7200 Ded	In Progress	01/01/2024	10/30/2023
1058658	Jacob BAXBAUM	OptimaFit Bronze 7200 40% Direct	Created	12/01/2023	10/20/2023
1058653	Dom Torretto	OptimaFit Bronze 7200 40% Direct	Created	12/01/2023	10/19/2023
1058380	Dom Torretto	OptimaFit Bronze 7200 40% Direct M	Created	12/01/2023	10/17/2023

4 Managing On-Exchange Enrollment

4.1 Update Personal Information

To make changes to the personal information of the customer, you will have to go to **Virginia's Insurance Marketplace Website** by following below steps.

Search for the customer from the **Customer** screen and drilldown on the customer name to navigate to **Individual Details** screen.



Personal Information

Name: Phillip Baxter	Subscriber#: 464499-01	Email: philip@yopmail.com
Status: Active	Renewal Date:	Termination Date:
Phone: (703) 964-1872	Effective Date: 01/01/2024	Termination Reason:
Sponsor Id:	Customer#: B677072P	Association Name: Optima Contact Center Agency

Additional Member Info

PCP Details

Coverage

Coverage Administration

Current Monthly Premium

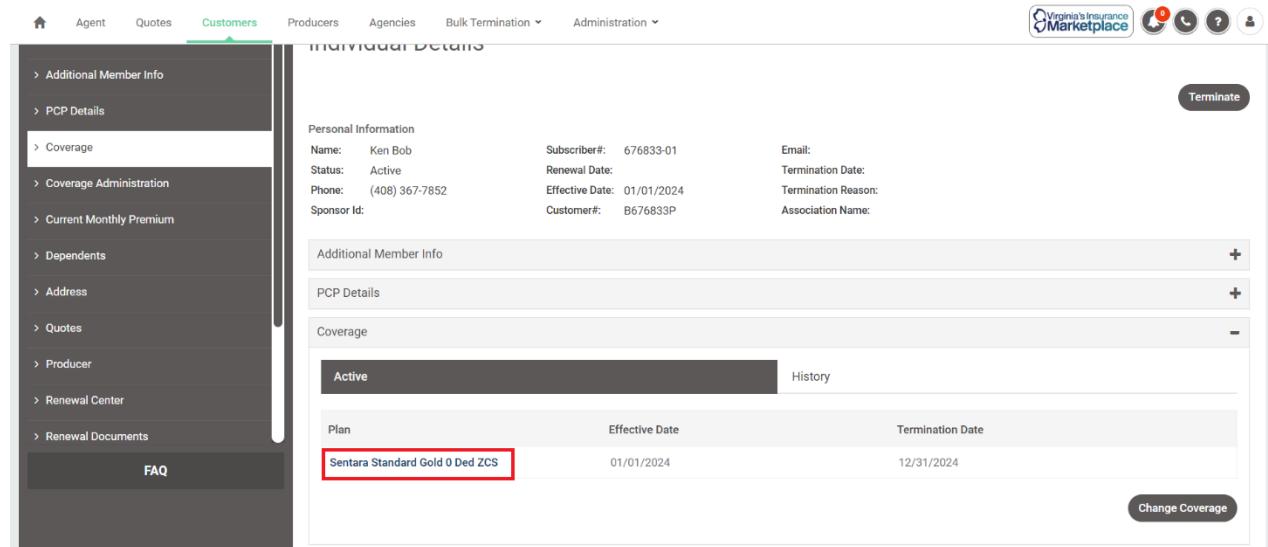
Dependents

Address

Quotes

Producer

Click on the **Coverage** tab or **Coverage Administration** tab and click on the **Plan Name** to navigate to the Coverage Detail Screen.



Personal Information

Name: Ken Bob	Subscriber#: 676833-01	Email:
Status: Active	Renewal Date:	Termination Date:
Phone: (408) 367-7852	Effective Date: 01/01/2024	Termination Reason:
Sponsor Id:	Customer#: B676833P	Association Name:

Additional Member Info

PCP Details

Coverage

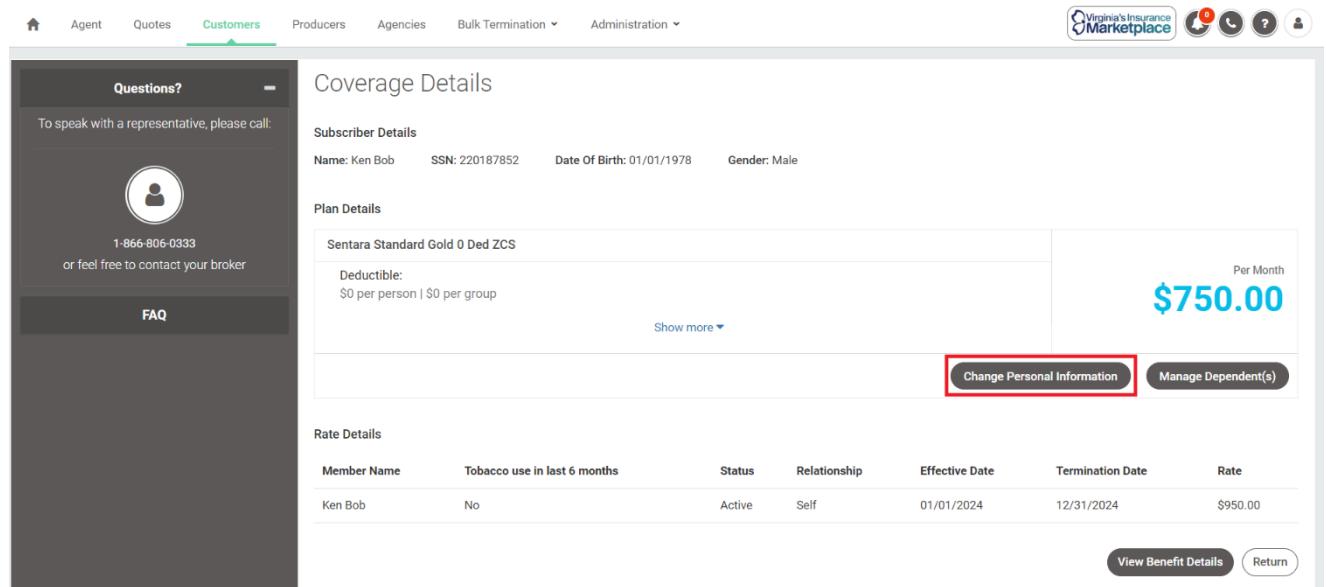
Active

History

Plan	Effective Date	Termination Date
Sentara Standard Gold 0 Ded ZCS	01/01/2024	12/31/2024

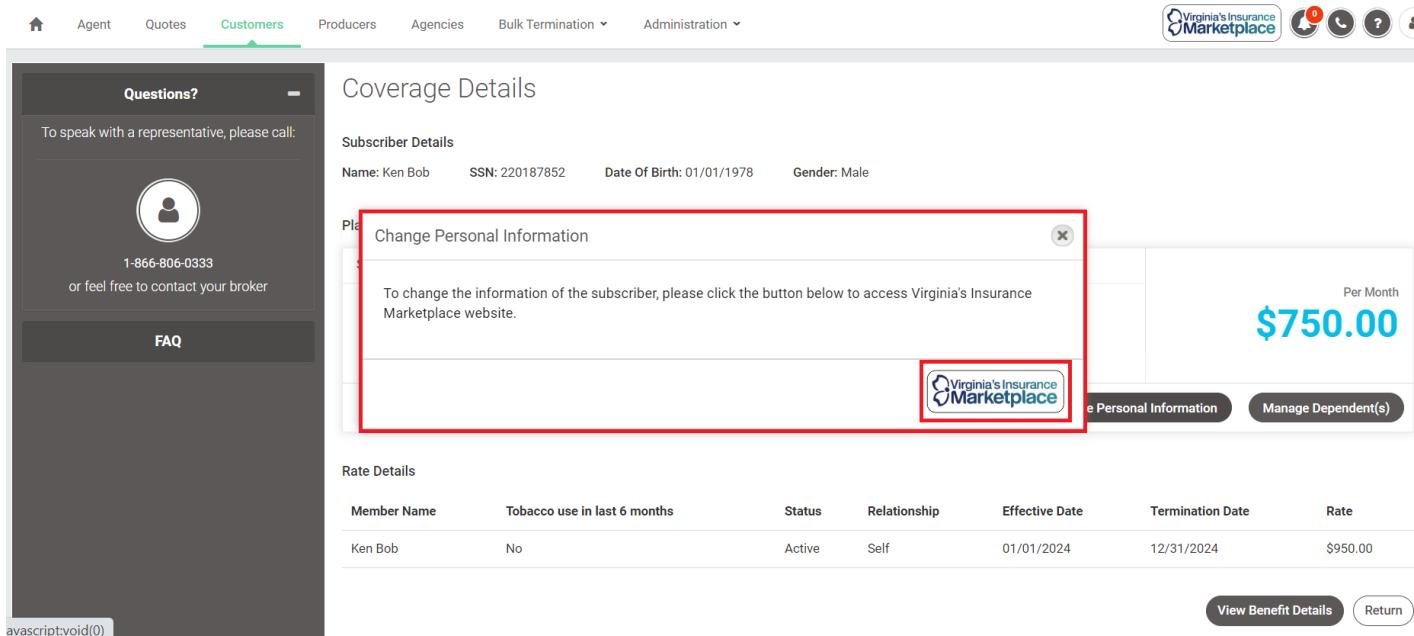
Change Coverage

You will be navigated to the below coverage detail screen. Click on the **Change Personal Information** button.



The screenshot shows the 'Coverage Details' page. At the top, there are navigation links: Home, Agent, Quotes, Customers (which is underlined in green), Producers, Agencies, Bulk Termination, and Administration. On the right, there are icons for a phone, a person, and a question mark. The main content area is titled 'Coverage Details'. It shows 'Subscriber Details' for a subscriber named Ken Bob, with SSN: 220187852, Date Of Birth: 01/01/1978, and Gender: Male. Below this is 'Plan Details' for 'Sentara Standard Gold 0 Ded ZCS', showing a monthly premium of '\$750.00'. A 'Change Personal Information' button is highlighted with a red box. There is also a 'Manage Dependent(s)' button. The 'Rate Details' section shows a table with one row for Ken Bob. At the bottom are 'View Benefit Details' and 'Return' buttons.

The system will display the below popup with the below message indicating that in order to change the personal information of the subscriber you will have to go to Virginia's Insurance Marketplace Website. You can click on the **Virginia's Insurance Marketplace Website** logo to get redirected by the system to the Virginia's Insurance Marketplace Website.

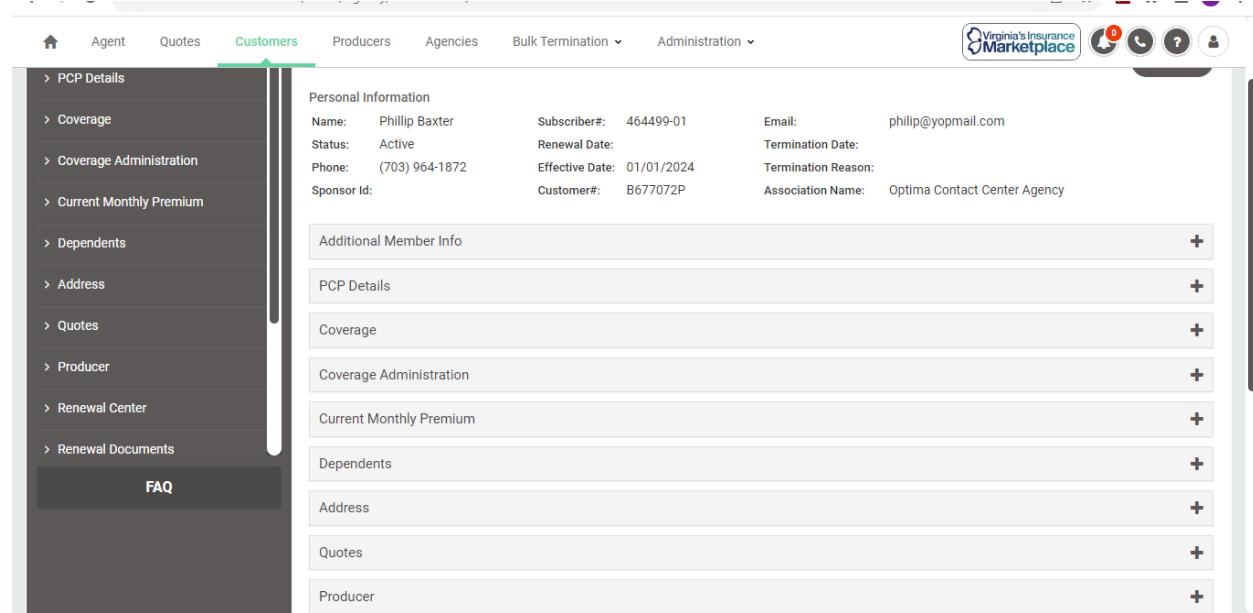


The screenshot shows the 'Coverage Details' page with a modal window titled 'Change Personal Information'. The modal contains the message: 'To change the information of the subscriber, please click the button below to access Virginia's Insurance Marketplace website.' Below the message is the 'Virginia's Insurance Marketplace' logo, which is also highlighted with a red box. The background of the page shows the same 'Coverage Details' content as the first screenshot, including the 'Change Personal Information' button.

4.2 Manage Member (Add/remove dependent)

To make changes to the covered members (add/remove dependent) to the coverage, you will have to go to **Virginia's Insurance Marketplace Website** by following below steps.

Search for the customer from the **Customer** screen and drilldown on the customer name to navigate to **Individual Details** screen.



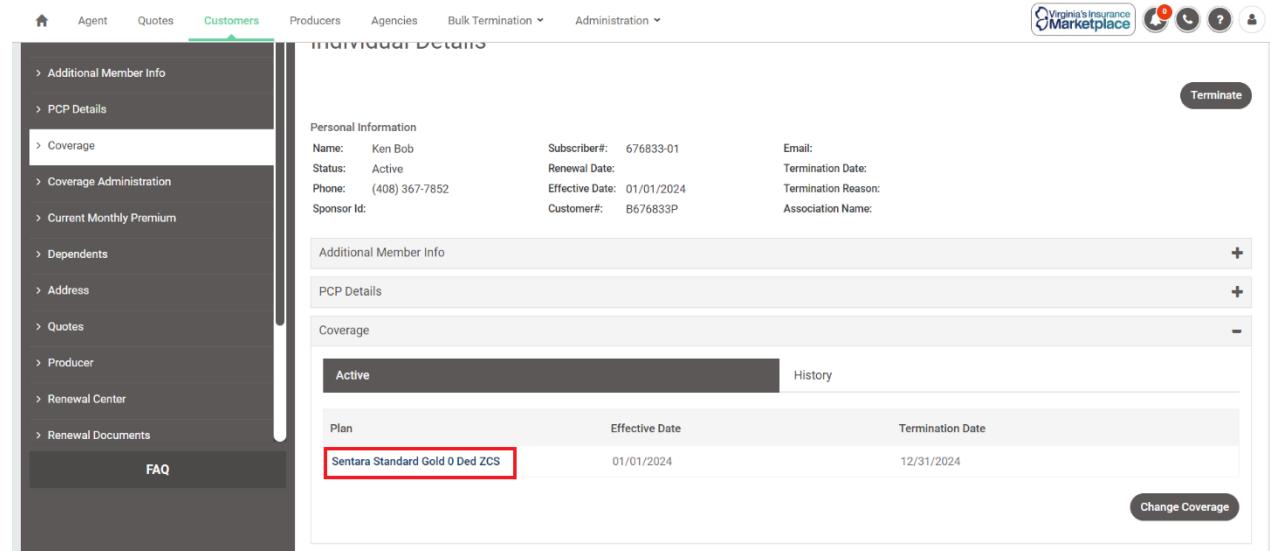
Personal Information

Name: Phillip Baxter	Subscriber#: 464499-01	Email: philip@yopmail.com
Status: Active	Renewal Date: 01/01/2024	Termination Date:
Phone: (703) 964-1872	Effective Date: 01/01/2024	Termination Reason:
Sponsor Id:	Customer#: B677072P	Association Name: Optima Contact Center Agency

Additional Member Info

- PCP Details
- Coverage
- Coverage Administration
- Current Monthly Premium
- Dependents
- Address
- Quotes
- Producer

Click on the **Coverage** tab or **Coverage Administration** tab and click on the **Plan Name** to navigate to the Coverage Detail Screen.



Personal Information

Name: Ken Bob	Subscriber#: 676683-01	Email:
Status: Active	Renewal Date:	Termination Date:
Phone: (408) 367-7852	Effective Date: 01/01/2024	Termination Reason:
Sponsor Id:	Customer#: B676683P	Association Name:

Additional Member Info

PCP Details

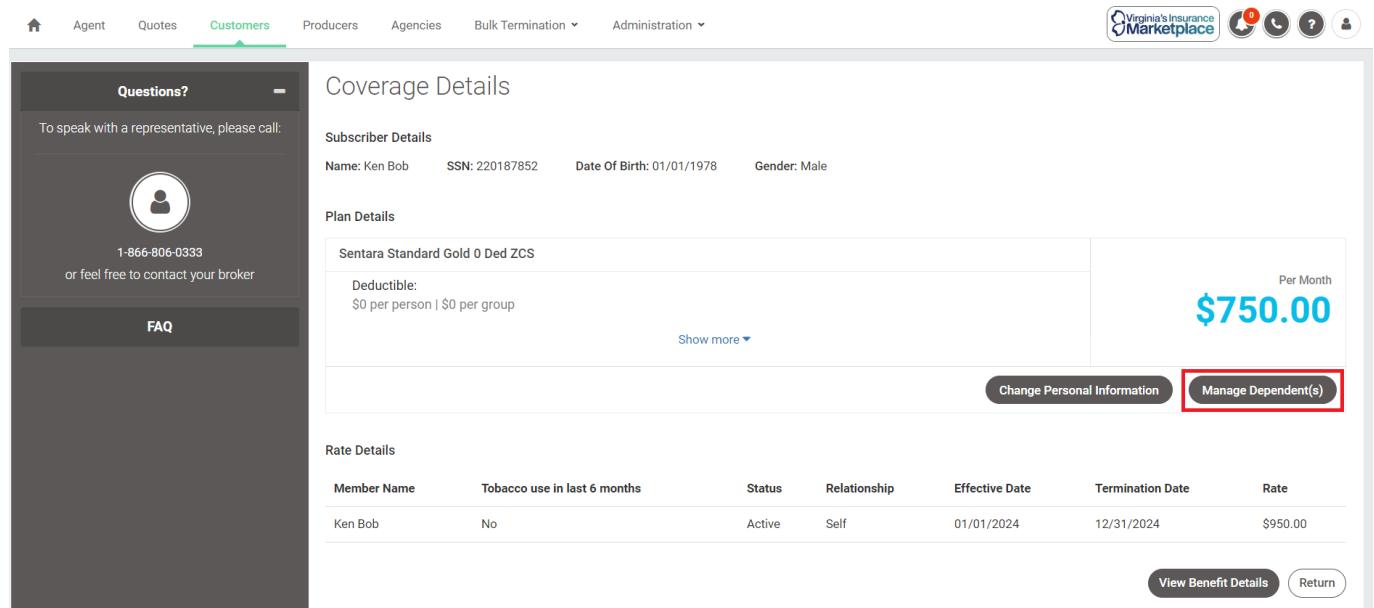
Coverage

Active

Plan	Effective Date	Termination Date
Sentara Standard Gold 0 Ded ZCS	01/01/2024	12/31/2024

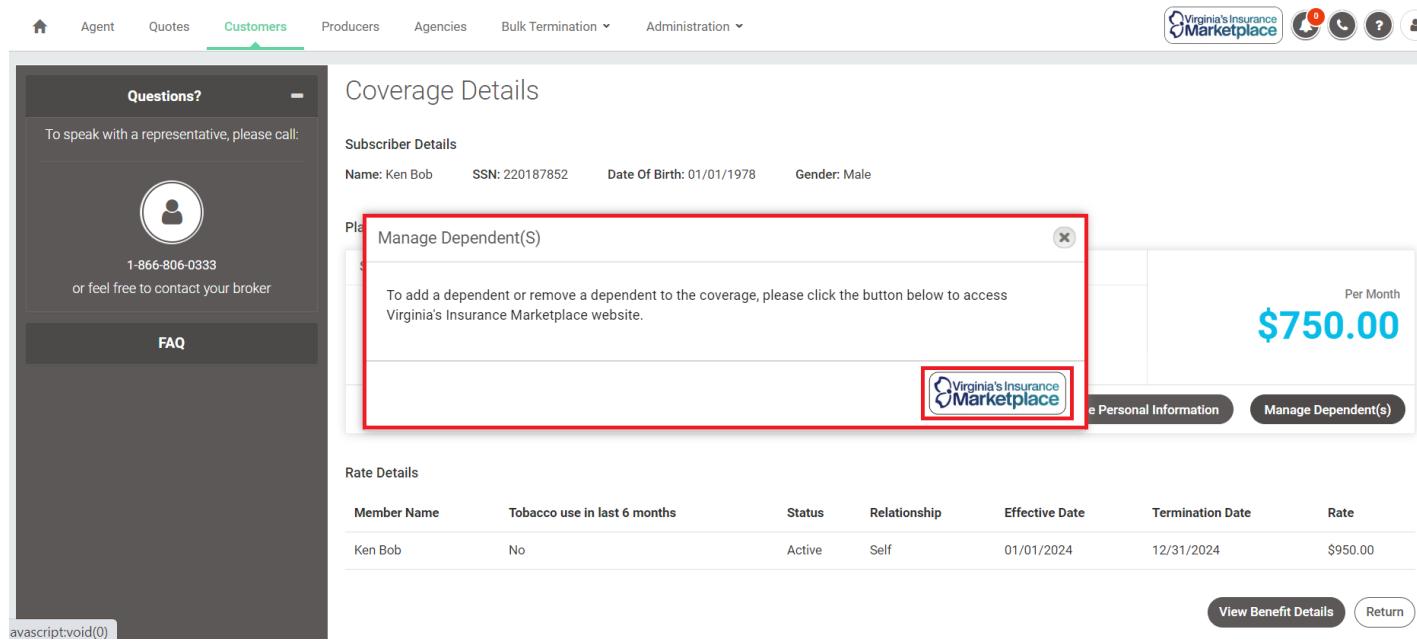
Change Coverage

You will be navigated to the below coverage detail screen. Click on the **Manage Dependent(s)** button.



The screenshot shows the 'Coverage Details' page. At the top, there are navigation links: Home, Agent, Quotes, **Customers** (which is underlined in green), Producers, Agencies, Bulk Termination, and Administration. On the right, there are icons for messaging, phone, and user profile. The main content area is titled 'Coverage Details'. It includes sections for 'Subscriber Details' (Name: Ken Bob, SSN: 220187852, Date Of Birth: 01/01/1978, Gender: Male), 'Plan Details' (Sentara Standard Gold 0 Ded ZCS, Deductible: \$0 per person | \$0 per group, Price: \$750.00 per month), and 'Rate Details' (table showing member name, tobacco use, status, relationship, effective date, termination date, and rate). At the bottom right, there are buttons for 'Change Personal Information' and 'Manage Dependent(s)', with the latter being highlighted by a red box.

The system will display below popup with the below message indicating that in order to add a dependent or remove a dependent you will have to go to Virginia's Insurance Marketplace Website. You can click on the **Virginia's Insurance Marketplace Website** logo to get redirected by the system to the Virginia's Insurance Marketplace Website.



The screenshot shows the 'Coverage Details' page with a modal window titled 'Manage Dependent(S)'. The modal contains the message: 'To add a dependent or remove a dependent to the coverage, please click the button below to access Virginia's Insurance Marketplace website.' At the bottom of the modal is the 'Virginia's Insurance Marketplace' logo, which is also highlighted with a red box. The background of the page shows the same coverage details and buttons as the first screenshot.

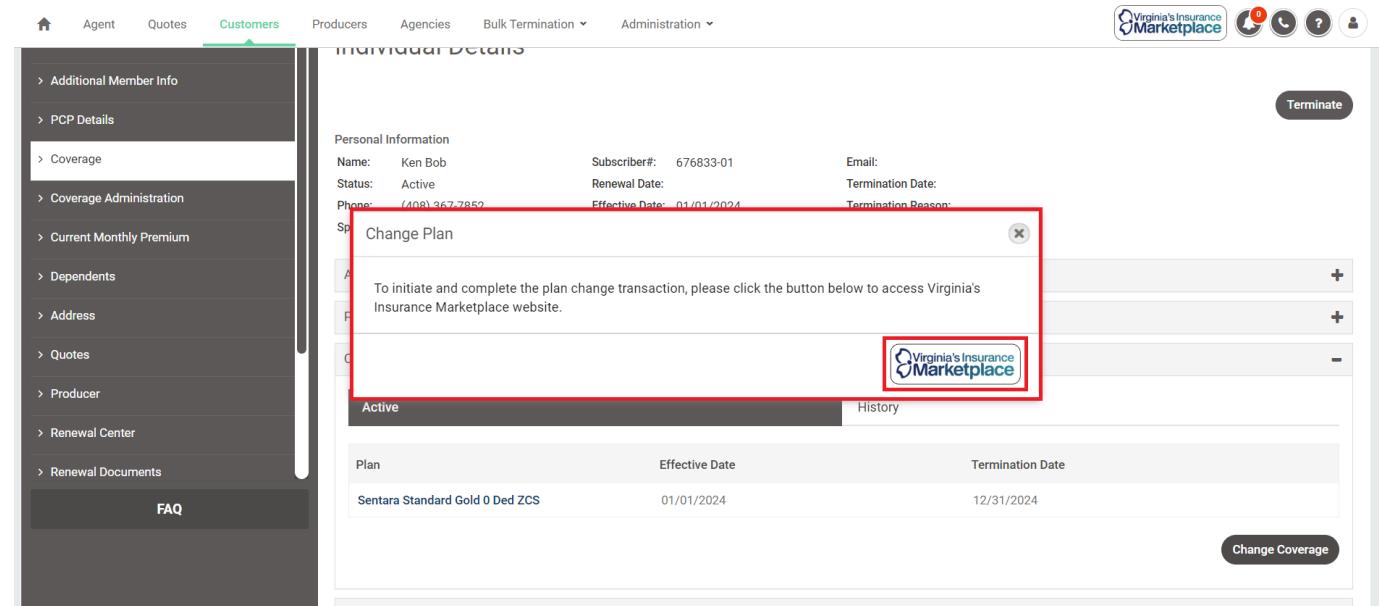
4.3 Change Coverage

To make changes to the on-exchange coverage, you will have to go to **Virginia's Insurance Marketplace Website** by following below steps.

Search for the customer from the **Customer** screen and drilldown on the customer name to navigate to **Individual Details** screen.

Click on the 'Change Coverage' button either from the **Coverage** tab or **Coverage Administration** tab as shown in the below screenshot.

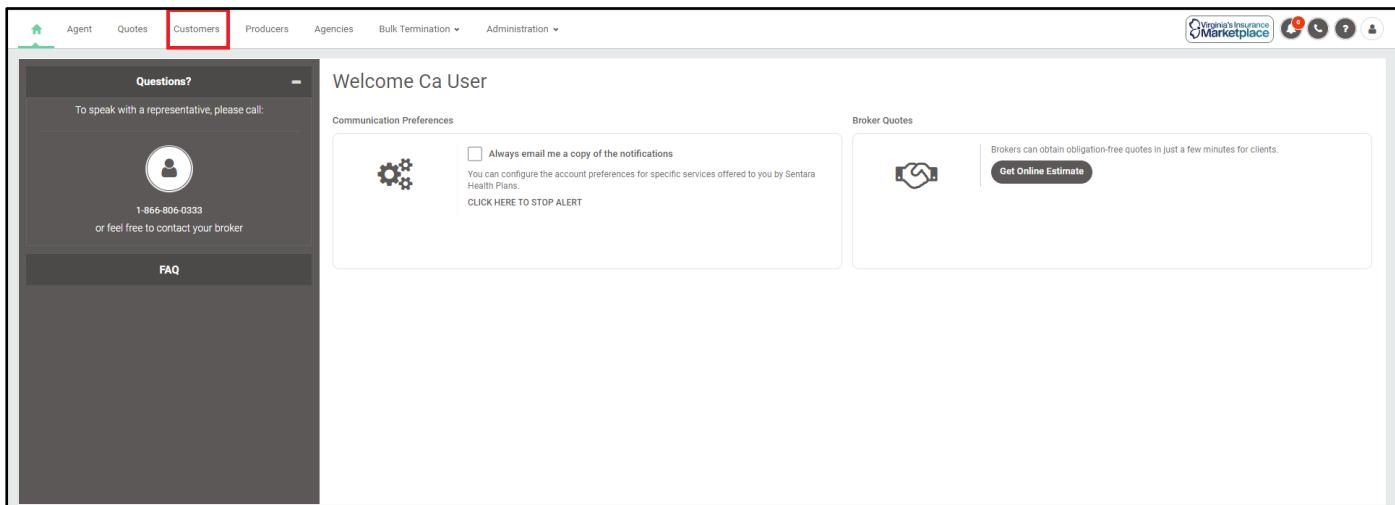
The system will display below popup with the below message indicating that in order to complete the transaction you will have to go to Virginia's Insurance Marketplace Website. You can click on the **Virginia's Insurance Marketplace Website** logo to get redirected by the system to the Virginia's Insurance Marketplace Website.



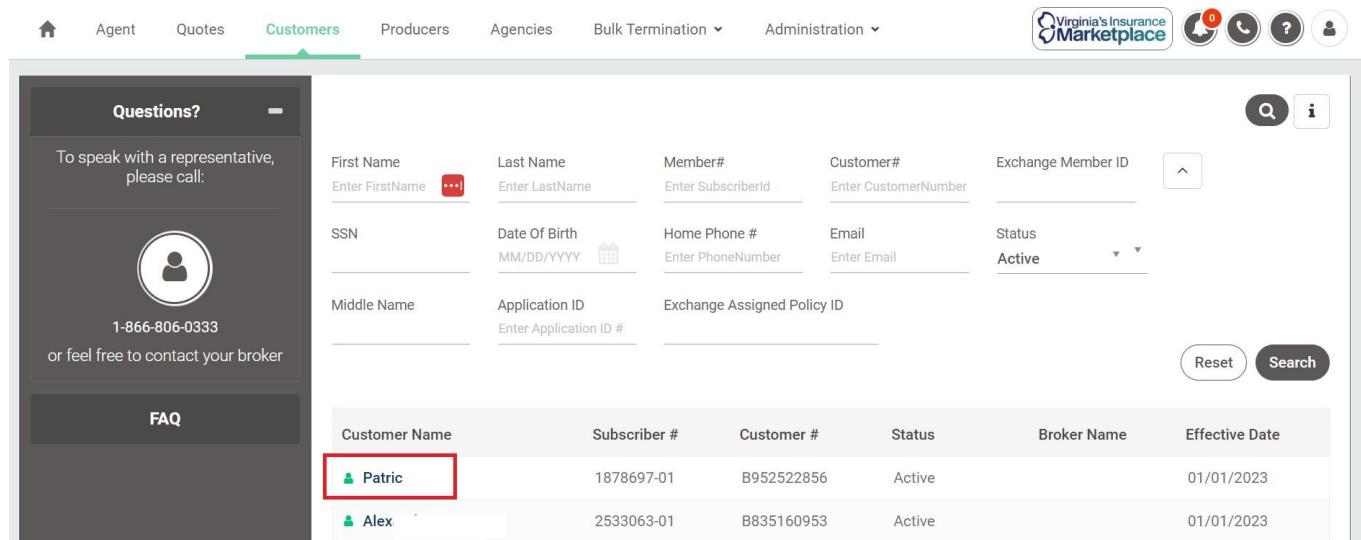
The screenshot shows the Sentara Health Plans Portal interface. The top navigation bar includes links for Agent, Quotes, Customers (which is the active tab), Producers, Agencies, Bulk Termination, and Administration. On the far right, there are icons for a user profile, a phone, a help desk, and a question mark. The main content area is titled "Individual Details". On the left, a sidebar lists various customer management options: Additional Member Info, PCP Details, Coverage, Coverage Administration, Current Monthly Premium, Dependents, Address, Quotes, Producer, Renewal Center, and Renewal Documents. A "FAQ" link is also present. The main panel displays "Personal Information" for a customer named Ken Bob, with details like Status: Active, Phone: (408) 367-7852, and Email: 676833-01. A "Change Plan" modal is open, containing a message: "To initiate and complete the plan change transaction, please click the button below to access Virginia's Insurance Marketplace website." Below this message is the "Virginia's Insurance Marketplace" logo, which is highlighted with a red box. The modal has a close button in the top right corner. At the bottom of the modal, there are tabs for "Active" (which is selected) and "History". A "Change Coverage" button is located at the bottom right of the main panel. The overall layout is clean and professional, typical of a healthcare insurance management system.

4.4 Manage Renewals (On-exchange Passive Renewal Quote/Plan finalization)

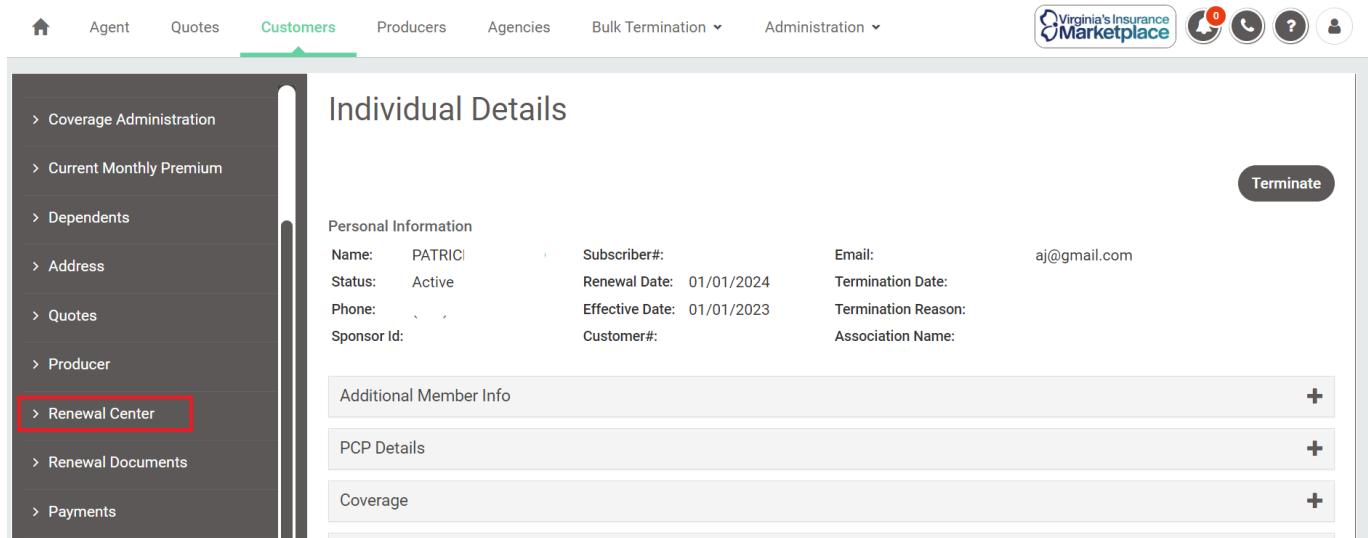
On the Sentara Health Plans Portal home page click on **Customers** tab.



The application displays the customer screen. Perform a search to bring up the expected customer by using various search criteria displayed in the below screenshot. Click on the **Customer Name** to navigate to the Customer/Individual Detail screen.

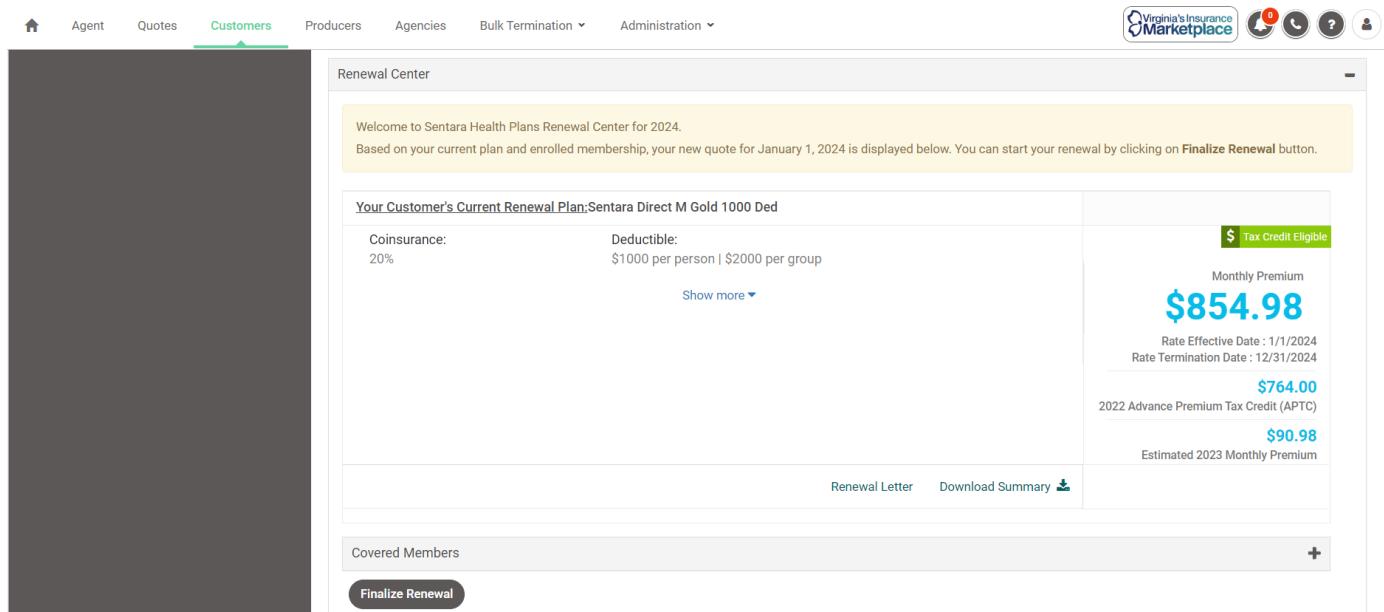


From the below Customer/Individual Detail Screen, click on the **Renewal Center** link on the left pane (this option is available only during the Open Enrollment period to review and confirm the enrollment for the next plan year).



The screenshot shows the 'Individual Details' page. The left sidebar contains a list of links: Coverage Administration, Current Monthly Premium, Dependents, Address, Quotes, Producer, Renewal Center (which is highlighted with a red box), Renewal Documents, and Payments. The main content area is titled 'Individual Details' and contains 'Personal Information' fields. Below these are sections for 'Additional Member Info', 'PCP Details', and 'Coverage'.

You will be navigated to the Renewal Center section of the screen as shown below. You can view the renewal plan, rate details, renewal letter that was sent out to the customer by mail and also view the benefit summary.



The screenshot shows the 'Renewal Center' page. It displays a welcome message: 'Welcome to Sentara Health Plans Renewal Center for 2024. Based on your current plan and enrolled membership, your new quote for January 1, 2024 is displayed below. You can start your renewal by clicking on Finalize Renewal button.' Below this, it shows 'Your Customer's Current Renewal Plan: Sentara Direct M Gold 1000 Ded'. It lists 'Coinsurance: 20%' and 'Deductible: \$1000 per person | \$2000 per group'. A 'Show more' button is present. To the right, it shows the 'Monthly Premium' as '\$854.98', with 'Tax Credit Eligible' indicated. It also shows 'Rate Effective Date: 1/1/2024' and 'Rate Termination Date: 12/31/2024'. Below the plan details, there are links for 'Renewal Letter' and 'Download Summary'. At the bottom, there is a 'Covered Members' section and a 'Finalize Renewal' button.

You can click on the 'Renewal Letter' link shown below to view the renewal letter that was sent out to the selected customer by mail.

Welcome to Sentara Health Plans Renewal Center for 2024.
Based on your current plan and enrolled membership, your new quote for January 1, 2024 is displayed below. You can start your renewal by clicking on **Finalize Renewal** button.

Your Customer's Current Renewal Plan: Sentara Direct M Gold 1000 Ded

Coinsurance: 20% Deductible: \$1000 per person | \$2000 per group

Monthly Premium
\$854.98
Rate Effective Date : 1/1/2024
Rate Termination Date : 12/31/2024

\$764.00
2022 Advance Premium Tax Credit (APTC)
\$90.98
Estimated 2023 Monthly Premium

Renewal Letter Download Summary

Covered Members

Finalize Renewal

You will see the renewal letter as shown below –

RenewalLetter_1-19466164198_20507VA141002606-20507VA141...

1 / 5 | - 100% + |

Sentara®
Health Plans

PO Box 66189
Virginia Beach, VA 23466

October 25, 2023

Pat
4600 Ma
Suffolk, VA, 23435

Important Health Plan Renewal Information

Dear Pat

Thank you for being a valued Individual & Family Plan member. It is important that you always understand your health plan coverage and any activity related to your policy. Your policy renewal date is approaching and current coverage for your OptimaFit Silver 50 (06) Direct M plan will renew on January 1, 2024.

We have exciting news as we approach the Open Enrollment period for plans effective January 1, 2024. First, Optima Health has changed its company name to **Sentara Health**.

You can download the summary of benefits by clicking the 'Download Summary' link shown in the below screenshot.

Agent Quotes **Customers** Producers Agencies Bulk Termination Administration

Virginia's Insurance Marketplace 

Renewal Center

Welcome to Sentara Health Plans Renewal Center for 2024. Based on your current plan and enrolled membership, your new quote for January 1, 2024 is displayed below. You can start your renewal by clicking on **Finalize Renewal** button.

Your Customer's Current Renewal Plan: Sentara Direct M Gold 1000 Ded

Coinsurance: 20%	Deductible: \$1000 per person \$2000 per group	\$854.98 Monthly Premium Rate Effective Date : 1/1/2024 Rate Termination Date : 12/31/2024
Show more ▾		\$764.00 2022 Advance Premium Tax Credit (APTC)
		\$90.98 Estimated 2023 Monthly Premium
Renewal Letter		Download Summary 
Covered Members		
Finalize Renewal		

You will see the Summary of Benefit document as shown below –

Summary of Benefits and Coverage: What this Plan Covers & What You Pay For Covered Services
Sentara Direct Bronze 7200 Ded
Sentara Health Plans

Coverage Period: Beginning on or after 01/01/2024
Coverage for: Individual/Family | **Plan Type:** HMO

 **The Summary of Benefits and Coverage (SBC) document will help you choose a health plan. The SBC shows you how you and the plan would share the cost for covered health care services. NOTE: Information about the cost of this plan (called the premium) will be provided separately. This is only a summary.** For more information about your coverage, or to get a copy of the complete terms of coverage, call 1-866-514-5916 or visit sentarahealthplans.com and sign into the Member Portal. For general definitions of common terms, such as allowed amount, balance billing, coinsurance, copayment, deductible, provider, or other underlined terms see the Glossary. You can view the Glossary at <https://www.healthcare.gov/sbc-glossary> or call 1-866-514-5916 to request a copy.

Important Questions	Answers	Why This Matters
What is the overall deductible?	\$7,200/Individual or \$14,400/family In-Network	Generally, you must pay all of the costs from providers up to the deductible amount before this plan begins to pay. If you have other family members on the plan, each family member must meet their own individual deductible until the total amount of deductible expenses paid by all family members meets the overall family deductible.
Are there services covered before you meet your deductible?	Yes. Most preventive care services and screenings are covered before you meet your deductible.	This plan covers some items and services even if you haven't yet met the deductible amount. But a copayment or coinsurance may apply. For example this plan covers certain preventive services without cost sharing and before you meet your deductible. See a list of covered preventive services at https://www.healthcare.gov/coverage/preventive-carebenefits/ .
Are there other deductibles for specific services?	No.	You don't have to meet deductibles for specific services.
What is the out-of-pocket limit for this plan?	For In-Network \$9,450 person / \$18,900 family	The out-of-pocket limit is the most you could pay in a year for covered services. If you have other family members in this plan, the overall family out-of-pocket limit must be met.
What is not included in the out-of-pocket limit?	Premiums, balance-billed charges, and health care this plan doesn't cover.	Even though you pay these expenses, they don't count toward the out-of-pocket limit.
Will you pay less if you use a network provider?	Yes. See http://www.sentarahealthplans.com or call 1-866-514-5916.	You pay the least if you use a provider in Tier 1. You pay more if you use a provider in Tier 2. You will pay the most if you use an out-of-network provider, and you might receive a bill from a provider for the difference between the provider's charge and what your plan pays (balance billing). Be aware, your network provider might use an out-of-network provider for some services (such

After reviewing plan, rate, renewal letter and summary of benefits, you can finalize the renewal for the upcoming plan year by clicking the 'Finalize Renewal' button shown in the below screenshot.

[Agent](#)[Quotes](#)[Customers](#)[Producers](#)[Agencies](#)[Bulk Termination](#)[Administration](#)

Renewal Center

Welcome to Sentara Health Plans Renewal Center for 2024.

Based on your current plan and enrolled membership, your new quote for January 1, 2024 is displayed below. You can start your renewal by clicking on **Finalize Renewal** button.

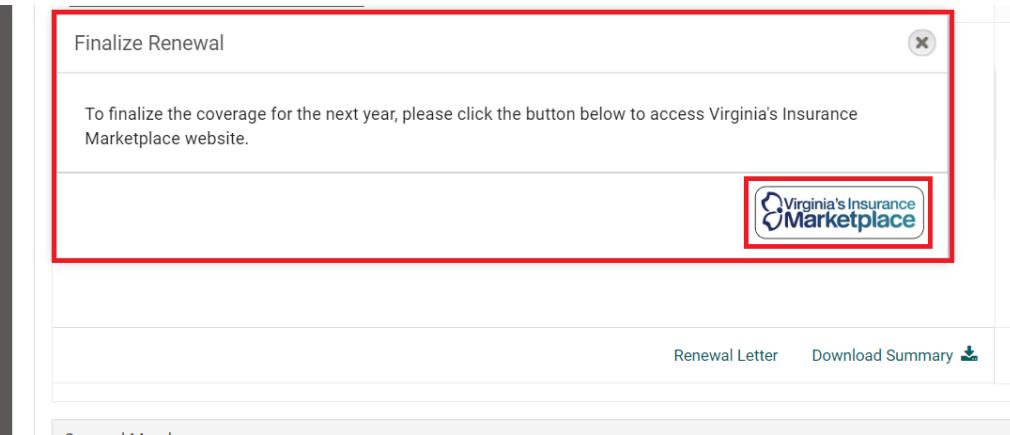
Your Customer's Current Renewal Plan: Sentara Direct M Gold 1000 Ded

Coinsurance: 20%	Deductible: \$1000 per person \$2000 per group	\$ Tax Credit Eligible
Show more ▾		Monthly Premium \$854.98 Rate Effective Date : 1/1/2024 Rate Termination Date : 12/31/2024
		\$764.00 2022 Advance Premium Tax Credit (APTC)
		\$90.98 Estimated 2023 Monthly Premium
Renewal Letter Download Summary		

Covered Members

Finalize Renewal

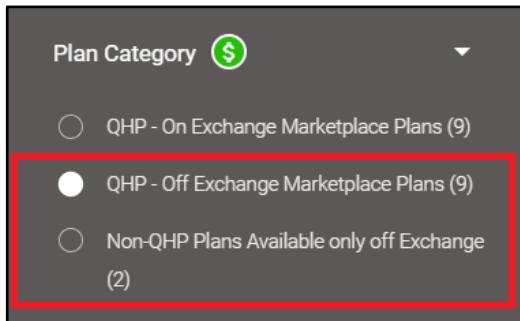
The system will display below popup with the below message indicating that to finalize the coverage for the next year you will have to go to Virginia's Insurance Marketplace Website. You can click on the **Virginia's Insurance Marketplace Website** logo to get redirected by the system to the Virginia's Insurance Marketplace Website.



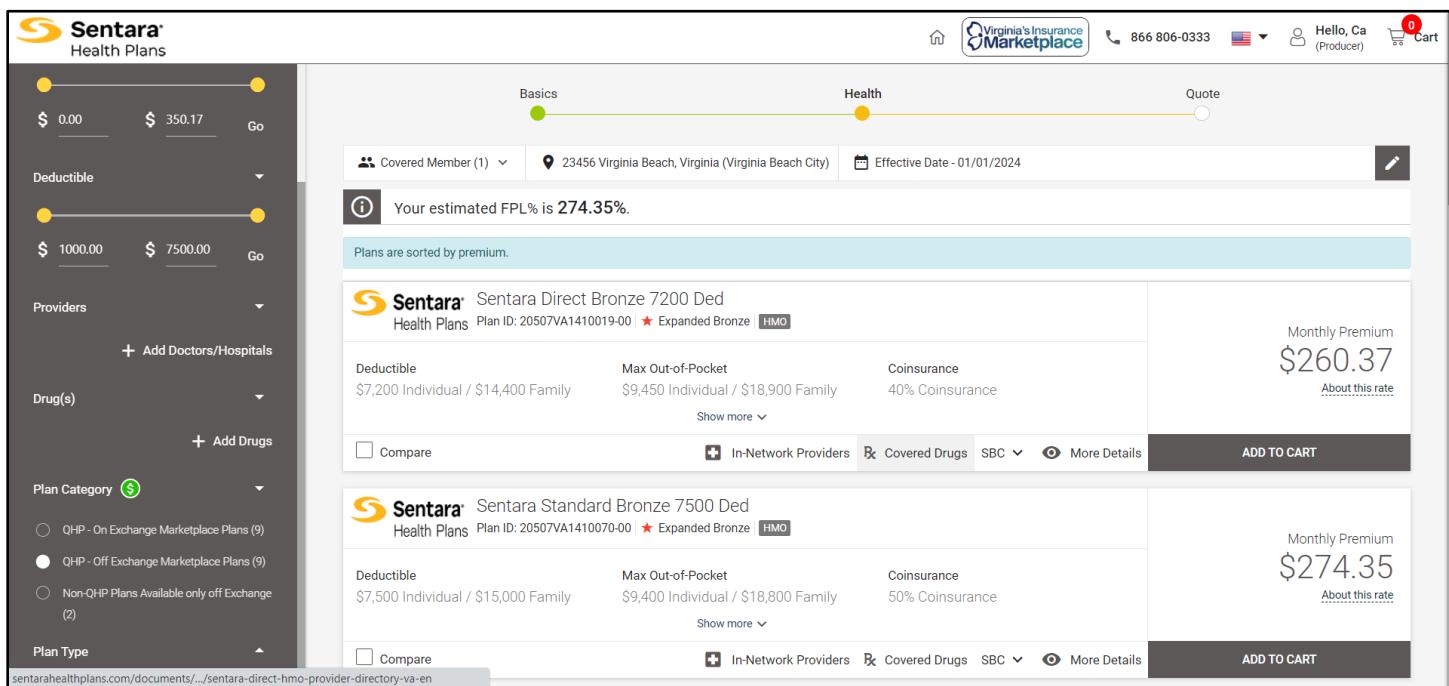
5 Quoting and Enrollment (Off-Exchange)

5.1 Start Quoting Process

Refer to [section 3.1 to 3.5](#) for steps to create a quote. The only difference between on-exchange and off-exchange quoting is that, to create an Off-Exchange quote, choose only these two plan types.



As a first step, before adding any plans to the cart, select the plan category as either **QHP Off-Exchange** or **Non-QHP Plan** to view all the off-exchange plans in the below plan listing screen.

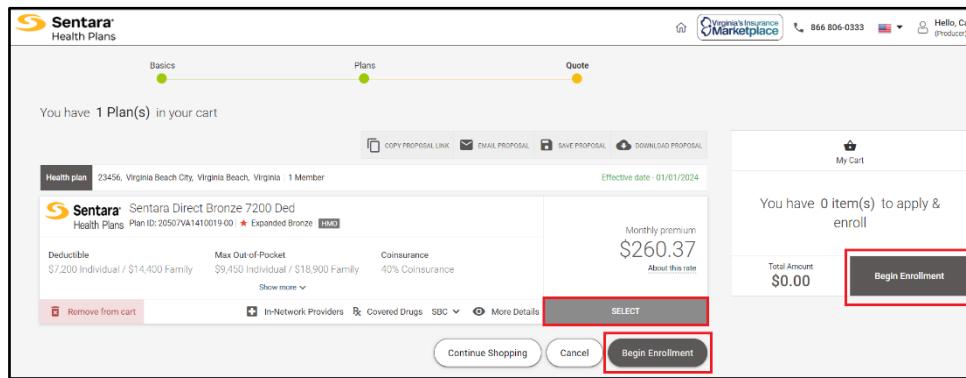


Plans are sorted by premium.

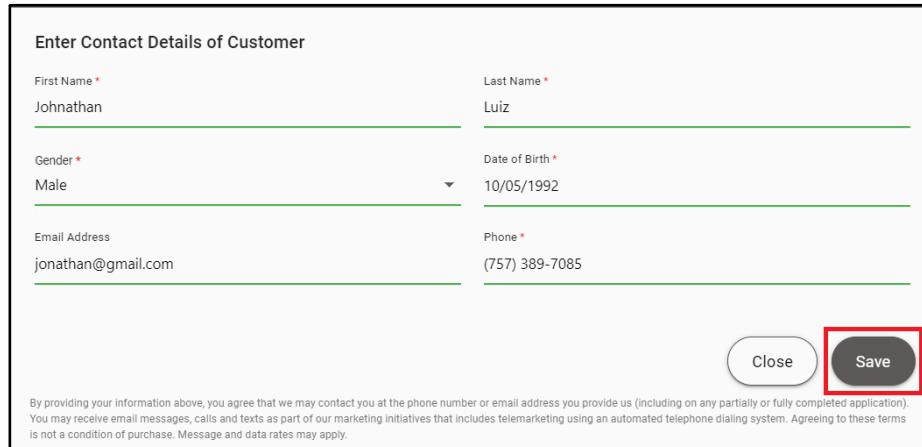
Plan	Plan ID	Type	Monthly Premium
Sentara Direct Bronze 7200 Ded	20507VA1410019-00	Expanded Bronze HMO	\$260.37
Sentara Standard Bronze 7500 Ded	20507VA1410070-00	Expanded Bronze HMO	\$274.35

5.2 Start Enrollment Process

Select the applicable plan by clicking on the grey **Select** button and then click on the **Begin Enrollment** button.



The application displays a pop-up to fill in the customer contact details as shown in the below screenshot. Enter the contact details and click **Save**.



Enter Contact Details of Customer

First Name *	Johnathan	Last Name *	Luiz
Gender *	Male	Date of Birth *	10/05/1992
Email Address	jonathan@gmail.com		
Phone *	(757) 389-7085		

By providing your information above, you agree that we may contact you at the phone number or email address you provide us (including on any partially or fully completed application). You may receive email messages, calls and texts as part of our marketing initiatives that includes telemarketing using an automated telephone dialing system. Agreeing to these terms is not a condition of purchase. Message and data rates may apply.

Save

The application displays **Overview Chapter** as shown in the below screenshot. Review the instructions and then click on the **Next** button.

The application displays **Your Household** section. Enter the personal information in the respective fields and click **Next**.

The application displays the **Coverage Detail** section. Click **Next** to display **Supporting Information** section.

Subscriber Application

Coverage Detail

Sentara Direct Bronze 7200 Ded Effective Date: 01/01/2024 Monthly Premium \$260.37

Member Name	Date Of Birth	Gender	Tobacco Usage	Rate
Johnathan Luiz	10/05/1992	Male	No	\$260.37

Previous Cancel Save And Finish Later **Next**

Enter the Insurance Broker and Agency information and click **Add**. Click **Next** to proceed.

Subscriber Application

Supporting Information

Broker Name	Agency Name
Ca User	Optima Contact Center Agency

Add

Previous Cancel Save And Finish Later **Next**

Add the required attachments and click **Add**. Click **Next** button.

Subscriber Application

Supporting Information

Attachment Type	File Name
No Data Found	

Add

Previous Cancel Save And Finish Later **Next**

You will be navigated to the below Accidental and Sickness Insurance confirmation page. Choose the applicable answer and click **Next**.

Subscriber Application

Accidental and Sickness Insurance

I confirm that I have read this replacement notice and have checked and/or initialed one of the following regarding my application:

This application is for coverage under an Sentara Health Plans Individual policy which if issued [will not replace other coverage presently in force](#)

This application is for coverage under an Sentara Health Plans Individual policy which if issued [will replace other coverage presently in force](#). Please read the following additional information regarding replacement coverage.

According to your application, you intend to lapse or otherwise terminate existing accident and sickness insurance and replace it with a policy to be issued by Sentara Health Plans. For your own information and protection, you should be aware of and seriously consider certain factors which may affect the insurance protection available to you under the new policy. You may wish to secure the advice of your present insurer or its agent regarding the proposed replacement of your present policy. This is not only your right, but it is also in your best interests to make sure you understand all the relevant factors involved in replacing your present coverage. If, after due consideration, you still wish to terminate your present policy and replace it with new coverage, be certain to truthfully and completely answer all questions on the application. After the application has been completed and before you sign it, re-read it carefully to be certain that all information has been properly recorded.

Previous Cancel Save And Finish Later **Next**

You will be navigated to the below Authorization screen. Electronically sign in to the application and click **Submit Application** button. The application will be sent for review.

Subscriber Application

Authorization

Certification and Authorization

Please review the application agreement provided [here](#). Click in the checkbox below to confirm that you have reviewed the agreement. This agreement is required to obtain coverage.

If you need to review your application before you proceed, please click on the number of the section you would like to view.

I, Ann Luiz have reviewed the agreement and have checked this box as my electronic signature.

Applicant Name *
Ann Luiz

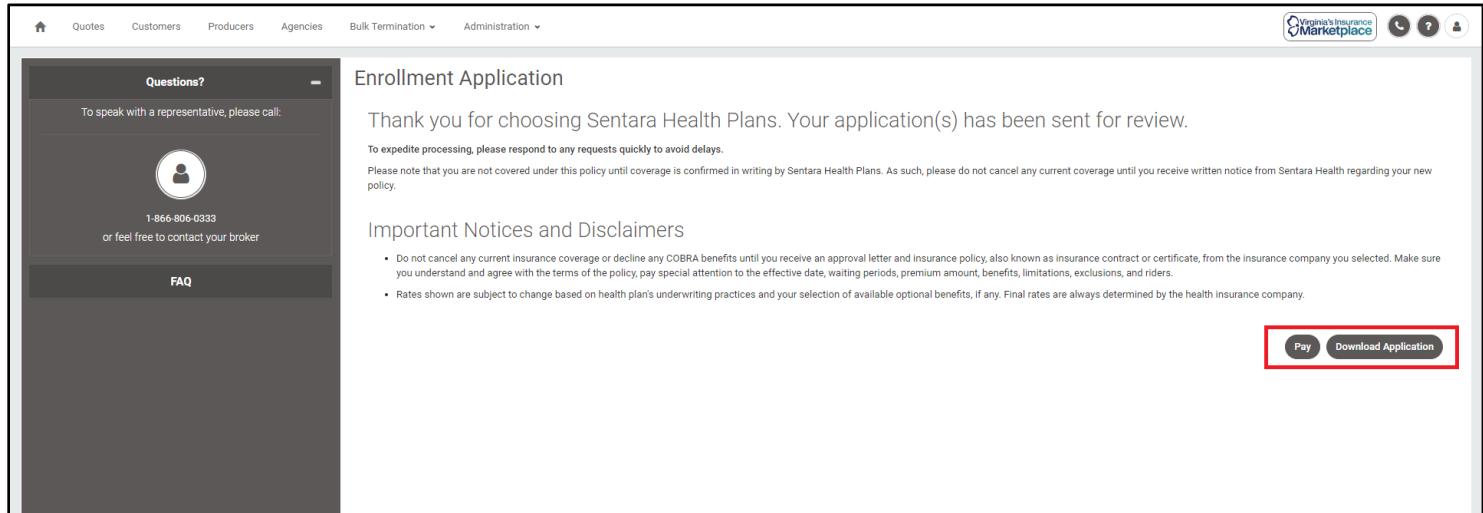
Type your name as it appears in the statement above.
[10/26/2023 10:23 AM - ZC1X09XK]

In order to finalize your enrollment, please submit the appropriate documentation to verify your Qualifying Life Event within 48 hours. For a list of acceptable documents, please visit [www.optimalehealth.com/sep](#). Documentation may be provided to [enrollmentdocumentation@sentrara.com](#), Fax: 1-866-700-1852, or Mail: Sentara Health Plans 4417 Corporation Lane, Attn: Enrollment Individual Product, Virginia Beach, VA 23462. For further assistance, please call 1-866-550-1516.

Previous **Submit Application**

To make the payment, click on **Pay** button. The application will be redirected to make the payment.

To download the application details into pdf, click on **Download Application** button.



Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Enrollment Application

Thank you for choosing Sentara Health Plans. Your application(s) has been sent for review.

To expedite processing, please respond to any requests quickly to avoid delays.

Please note that you are not covered under this policy until coverage is confirmed in writing by Sentara Health Plans. As such, please do not cancel any current coverage until you receive written notice from Sentara Health regarding your new policy.

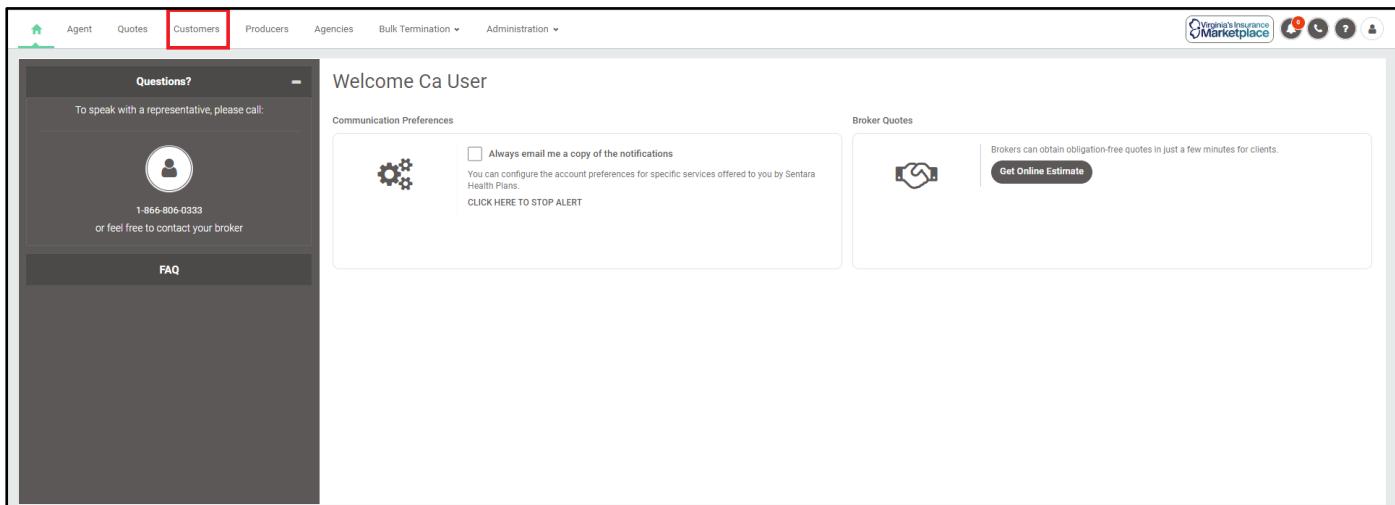
Important Notices and Disclaimers

- Do not cancel any current insurance coverage or decline any COBRA benefits until you receive an approval letter and insurance policy, also known as insurance contract or certificate, from the insurance company you selected. Make sure you understand and agree with the terms of the policy, pay special attention to the effective date, waiting periods, premium amount, benefits, limitations, exclusions, and riders.
- Rates shown are subject to change based on health plan's underwriting practices and your selection of available optional benefits, if any. Final rates are always determined by the health insurance company.

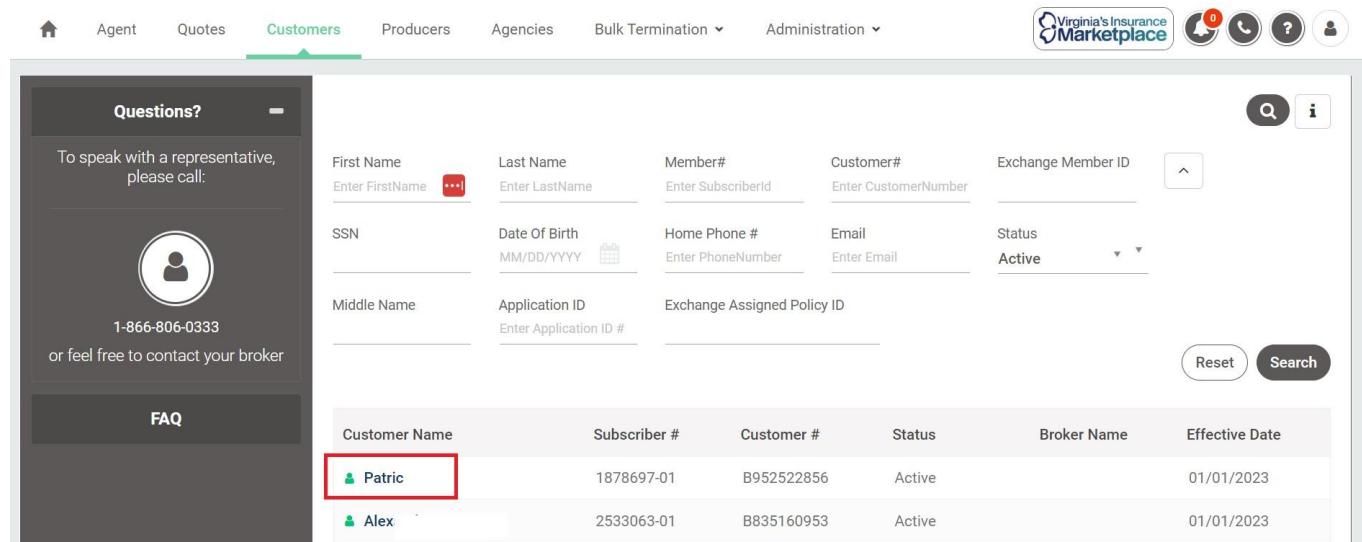
Pay **Download Application**

5.3 Managing Renewal (Off-Exchange Passive Renewal Quote/Plan finalization)

On the Sentara Health Plans Portal home page click on **Customers** tab.



The application displays the customer screen. Perform a search to bring up the expected customer by using various search criteria displayed in the below screenshot. Click on the **Customer Name** to navigate to the Customer/Individual Detail screen.



From the below Customer/Individual Detail Screen, click on the **Renewal Center** link on the left pane (this option is available only during the Open Enrollment period to review and confirm the enrollment for the next plan year).

Individual Details

Personal Information

Name: PATRICI Subscriber#: Email: aj@gmail.com
 Status: Active Renewal Date: 01/01/2024 Termination Date:
 Phone: Effective Date: 01/01/2023 Termination Reason:
 Sponsor Id: Customer#: Association Name:

Additional Member Info +

PCP Details +

Coverage +

Terminate

You will be navigated to the Renewal Center section of the screen as shown below. You can view the renewal plan, rate details, renewal letter that was sent out to the customer by mail and also view the benefit summary.

Welcome to the Sentara Health Plans Renewal Center for 2024.

Based on your customer's current plan and enrolled membership, the new quote for January 1, 2024 is displayed below. If you and your customer are happy with this quote, select the **Finalize Renewal** button below.

To create additional renewal quotes for this customer, select the **Create Renewal** button below. You or your customer may create as many renewal quotes as you like through December 15, 2023 for the January 1st renewal date. Once satisfied with a renewal quote, you or your customer must select **Finalize Renewal** by December 15th, or the current coverage and membership will be selected with the new rate shown below.

If your customer changes their mind after the renewal plan is finalized, you will still have the option to select a new plan or make other changes for Open Enrollment by returning to the **Coverage** section of the homepage and selecting the **Change Coverage** option.

Your Customer's Current Renewal Plan: Sentara Direct Bronze 7200 Ded

Coinsurance: 40%	Deductible: \$7200 per person \$14400 per group	Monthly Premium \$570.47 Rate Effective Date : 1/1/2024 Rate Termination Date : 12/31/2024
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Renewal Letter Download Summary

Covered Members +

Finalize Renewal Create Renewal Quote

You can click on the 'Renewal Letter' link shown below to view the renewal letter that was sent out to the selected customer by mail.

You will see the renewal letter as shown below –

You can download the summary of benefits by clicking the 'Download Summary' link shown in the below screenshot.

You will see the Summary of Benefit document as shown below –

Summary of Benefits and Coverage: What this Plan Covers & What You Pay For Covered Services
Sentara Direct Bronze 7200 Ded
Sentara Health Plans

Coverage Period: Beginning on or after 01/01/2024
Coverage for: Individual/Family | **Plan Type:** HMO

Note: The Summary of Benefits and Coverage (SBC) document will help you choose a health plan. The SBC shows you how you and the plan would share the cost for covered health care services. NOTE: Information about the cost of this plan (called the premium) will be provided separately. This is only a summary. For more information about your coverage, or to get a copy of the complete terms of coverage, call 1-866-514-5916 or visit sentarahealthplans.com and sign into the Member Portal. For general definitions of common terms, such as allowed amount, balance billing, coinsurance, copayment, deductible, provider, or other underlined terms see the Glossary. You can view the Glossary at <https://www.healthcare.gov/sbc-glossary> or call 1-866-514-5916 to request a copy.

Important Questions	Answers	Why This Matters
What is the overall deductible?	\$7,200/Individual or \$14,400/family In-Network	Generally, you must pay all of the costs from providers up to the deductible amount before this plan begins to pay. If you have other family members on the plan, each family member must meet their own individual deductible until the total amount of deductible expenses paid by all family members meets the overall family deductible.
Are there services covered before you meet your deductible?	Yes. Most preventive care services and screenings are covered before you meet your deductible.	This plan covers some items and services even if you haven't yet met the deductible amount. But a copayment or coinsurance may apply. For example this plan covers certain preventive services without cost sharing and before you meet your deductible. See a list of covered preventive services at https://www.healthcare.gov/coverage/preventive-carebenefits/ .
Are there other deductibles for specific services?	No.	You don't have to meet deductibles for specific services.
What is the out-of-pocket limit for this plan?	For In-Network \$9,450 person / \$18,900 family	The out-of-pocket limit is the most you could pay in a year for covered services. If you have other family members in this plan, the overall family out-of-pocket limit must be met.
What is not included in the out-of-pocket limit?	Premiums, balance-billed charges, and health care this plan doesn't cover.	Even though you pay these expenses, they don't count toward the out-of-pocket limit.
Will you pay less if you use a network provider?	Yes. See http://www.sentarahealthplans.com or call 1-866-514-5916.	You pay the least if you use a provider in Tier 1. You pay more if you use a provider in Tier 2. You will pay the most if you use an out-of-network provider, and you might receive a bill from a provider for the difference between the provider's charge and what your plan pays (balance billing). Be aware, your network provider might use an out-of-network provider for some services (such as emergency care).

After reviewing plan, rate, renewal letter and summary of benefits, you can finalize the renewal for the upcoming plan year by clicking the 'Finalize Renewal' button shown in the below screenshot.

Welcome to the Sentara Health Plans Renewal Center for 2024.

Based on your customer's current plan and enrolled membership, the new quote for January 1, 2024 is displayed below. If you and your customer are happy with this quote, select the **Finalize Renewal** button below.

To create additional renewal quotes for this customer, select the **Create Renewal** button below. You or your customer may create as many renewal quotes as you like through December 15, 2023 for the January 1st renewal date. Once satisfied with a renewal quote, you or your customer must select **Finalize Renewal** by December 15th, or the current coverage and membership will be selected with the new rate shown below.

If your customer changes their mind after the renewal plan is finalized, you will still have the option to select a new plan or make other changes for Open Enrollment by returning to the **Coverage** section of the homepage and selecting the **Change Coverage** option.

Your Customer's Current Renewal Plan: Sentara Direct Bronze 7200 Ded

Coinsurance: 40%	Deductible: \$7200 per person \$14400 per group	Monthly Premium \$570.47
Show more ▾		Rate Effective Date : 1/1/2024 Rate Termination Date : 12/31/2024
		Renewal Letter Download Summary

Covered Members

Finalize Renewal **Create Renewal Quote**

You will be navigated to the below screen where you can select the plan for the customer to be enrolled for the next plan year. Click on the 'Select Plan' checkbox highlighted in red and hit the Next button as shown in the below screenshot.

Finalize Renewal

This page will allow you to select and finalize your customer's renewal plan for 2024. Click the checkbox next to the selected renewal quote below and click **NEXT** at the bottom of the page.

If you do not wish to finalize any of the quotes below, then click **CANCEL**. You will be returned to the main page of the Renewal Center, where you can create a new quote for renewal.

Select the checkbox next to your final renewal plan:

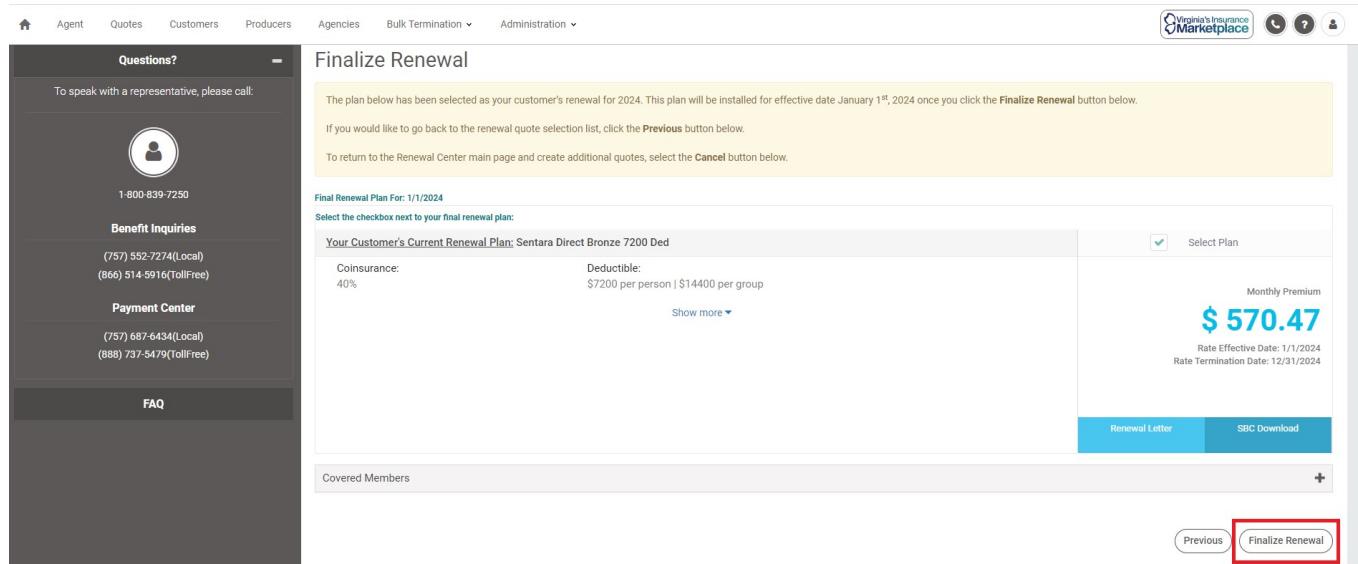
Your Customer's Current Renewal Plan: Sentara Direct Bronze 7200 Ded

Coinsurance: 40%	Deductible: \$7200 per person \$14400 per group	<input checked="" type="checkbox"/> Select Plan
Show more ▾		Monthly Premium \$ 570.47
		Rate Effective Date: 1/1/2024 Rate Termination Date: 12/31/2024
		Renewal Letter SBC Download

Covered Members

Next

You will be navigated to the final confirmation page to review. After reviewing the information on the confirmation page, you can click on the 'Finalize Renewal' button to confirm the enrollment for the upcoming plan year.



The plan below has been selected as your customer's renewal for 2024. This plan will be installed for effective date January 1st, 2024 once you click the **Finalize Renewal** button below.

If you would like to go back to the renewal quote selection list, click the **Previous** button below.

To return to the Renewal Center main page and create additional quotes, select the **Cancel** button below.

Final Renewal Plan For: 1/1/2024

Select the checkbox next to your final renewal plan:

Your Customer's Current Renewal Plan: Sentara Direct Bronze 7200 Ded

Coinsurance:	Deductible:	Monthly Premium
40%	\$7200 per person \$14400 per group	\$ 570.47

Rate Effective Date: 1/1/2024
Rate Termination Date: 12/31/2024

Renewal Letter **SBC Download**

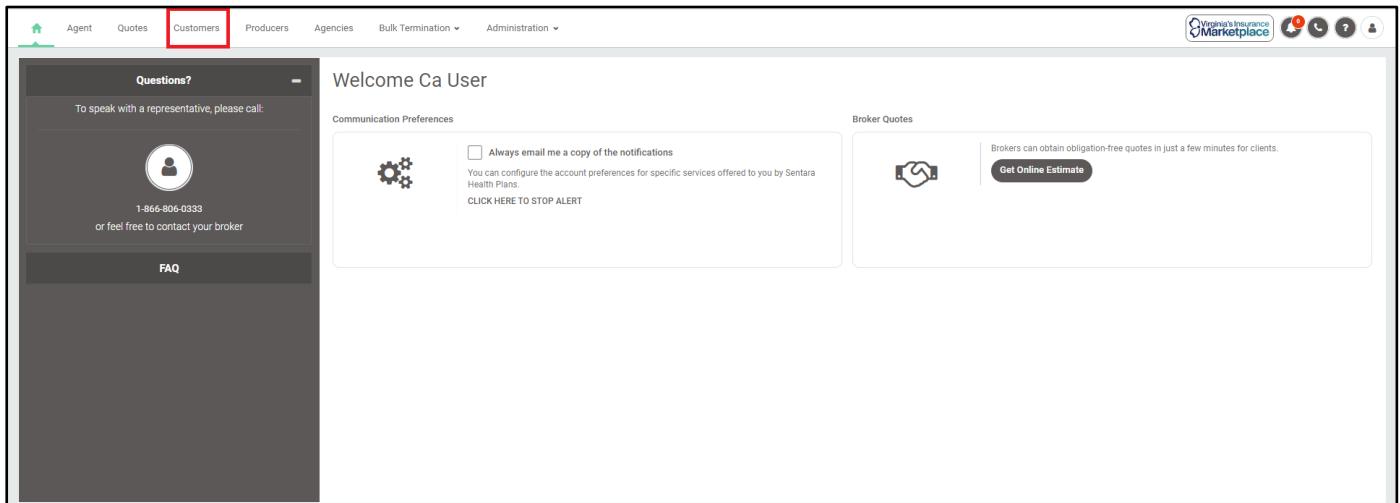
Covered Members +

Previous **Finalize Renewal**

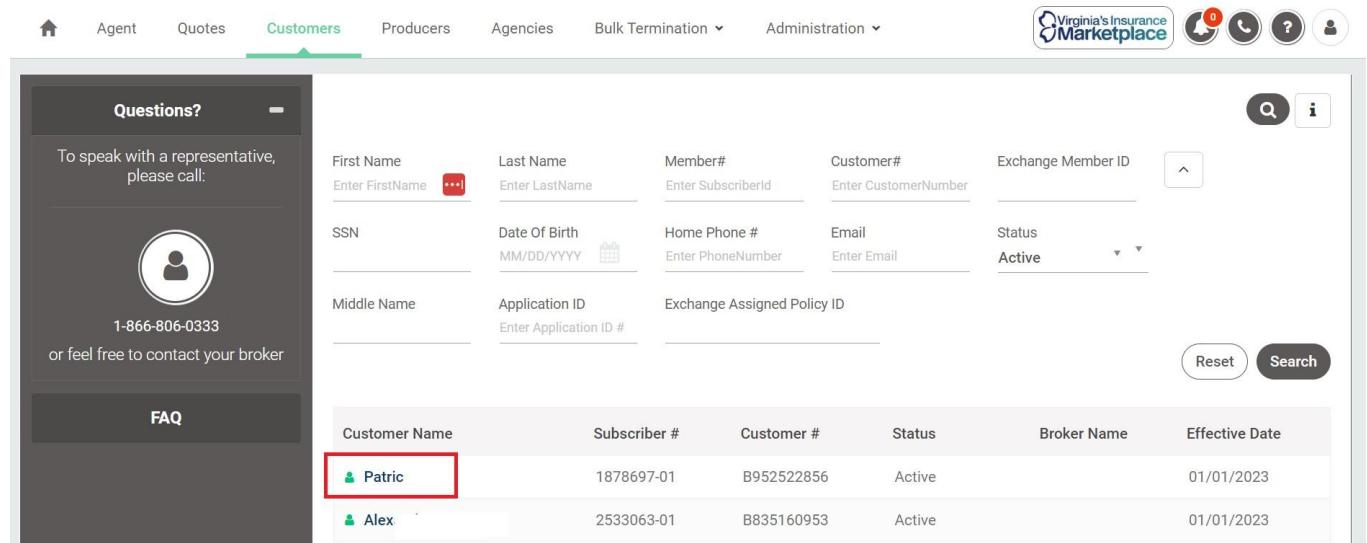
Now, the selected customer is all set with the enrollment for renewal year.

5.4 Managing Renewal (Off-Exchange Alternate Renewal Quote/Plan finalization)

On the Sentara Health Plans Portal home page click on **Customers** tab.



The application displays the customer screen. Perform a search to bring up the expected customer by using various search criteria displayed in the below screenshot. Click on the **Customer Name** to navigate to the Customer/Individual Detail screen.



From the below Customer/Individual Detail screen, click **Renewal Center** link on the left pane (this option is available only during the Open Enrollment period to review and confirm the enrollment for the next plan year).

You will be navigated to the Renewal Center section of the screen as shown below. You can view the renewal plan, rate details, renewal letter that was sent out to the customer by mail and also the benefit summary.

To create an alternate renewal quote, click on the 'Create Renewal Quote' button highlighted in the below screenshot.

Welcome to the Sentara Health Plans Renewal Center for 2024.

Based on your customer's current plan and enrolled membership, the new quote for January 1, 2024 is displayed below. If you and your customer are happy with this quote, select the **Finalize Renewal** button below.

To create additional renewal quotes for this customer, select the **Create Renewal** button below. You or your customer may create as many renewal quotes as you like through December 15, 2023 for the January 1st renewal date. Once satisfied with a renewal quote, you or your customer must select **Finalize Renewal** by December 15th, or the current coverage and membership will be selected with the new rate shown below.

If your customer changes their mind after the renewal plan is finalized, you will still have the option to select a new plan or make other changes for Open Enrollment by returning to the **Coverage** section of the homepage and selecting the **Change Coverage** option.

Your Customer's Current Renewal Plan: Sentara Direct Bronze 7200 Ded

Coinsurance:	Deductible:	Monthly Premium
40%	\$7200 per person \$14400 per group	\$570.47
Show more ▾		Rate Effective Date : 1/1/2024 Rate Termination Date : 12/31/2024
		Renewal Letter Download Summary

Covered Members

Finalize Renewal **Create Renewal Quote**

You will be navigated to the plan listing page as shown in the below screenshot. By default, the filter will be applied to display the off-exchange plans. You can review the plan and rate details. After choosing the right plan, click on the 'Add to Cart' button. As soon as the you click on the 'Add to Cart' button, you will be automatically navigated/redirected back to the Customer/Individual Detail Screen.

Individual Details

Personal Information

Name: Millicent Doss	Subscriber#: 1900450-01	Email: millydoss@hotmail.com
Status: Active	Renewal Date: 01/01/2024	Termination Date:
Phone:	Effective Date: 01/01/2022	Termination Reason:
Sponsor Id:	Customer#: D994471082	Association Name: Virginias Health Insurance Agent LLC.

Additional Member Info

PCP Details

Coverage

Coverage Administration

Current Monthly Premium

Dependents

Address

Quotes

Producer

Renewal Center

FAQ

Terminate

You can then click on the 'Renewal Center' link on the left pane to navigate to the renewal center screen again. Now you will see both passive renewed quote as well as alternate renewal quote generated in the above step. After reviewing the details on this page, click on the 'Finalize Renewal' at the bottom of this renewal center section.

To create additional renewal quotes for this customer, select the **Create Renewal** button below. You or your customer may create as many renewal quotes as you like through December 15, 2023 for the January 1st renewal date. Once satisfied with a renewal quote, you or your customer must select **Finalize Renewal** by December 15th, or the current coverage and membership will be selected with the new rate shown below.

If your customer changes their mind after the renewal plan is finalized, you will still have the option to select a new plan or make other changes for Open Enrollment by returning to the **Coverage** section of the homepage and selecting the **Change Coverage** option.

Your Customer's Current Renewal Plan: Sentara Direct Bronze 7200 Ded		Monthly Premium
Coinsurance: 40%	Deductible: \$7200 per person \$14400 per group	\$570.47 Rate Effective Date : 1/1/2024 Rate Termination Date : 12/31/2024
Renewal Letter Download Summary		

Covered Members

Alternate Quote 1

Alternate Quote: Sentara Direct Bronze 7500 Ded Created 10/31/2023 by Sreehari V		Monthly Premium
Coinsurance: 40%	Deductible: \$7200 per person \$14400 per group	\$601.09 Rate Effective Date : 1/1/2024 Rate Termination Date : 12/31/2024
Download Summary		

You will be navigated to the below screen where you can choose which of the quote to be selected for finalizing the renewal. You will have to click on the 'Select Plan' checkbox in the alternate quote tile if you prefer to renew the customer into alternate renewal quote. After selecting the required quote, click on the 'Next' button.

[Home](#) [Quotes](#) [Customers](#) [Producers](#) [Agencies](#) [Bulk Termination](#) [Administration](#)

[SBC Download](#)

Alternate Quote 1		Monthly Premium
Alternate Quote: Sentara Standard Bronze 7500 Ded Created 10/31/2023 by Sreehari V		\$ 570.47 Rate Effective Date: 1/1/2024 Rate Termination Date: 12/31/2024
<input checked="" type="checkbox"/> Select Plan		SBC Download
<input checked="" type="checkbox"/> Select Plan		\$ 601.09 Rate Effective Date: 1/1/2024 Rate Termination Date: 12/31/2024
SBC Download		

Covered Members

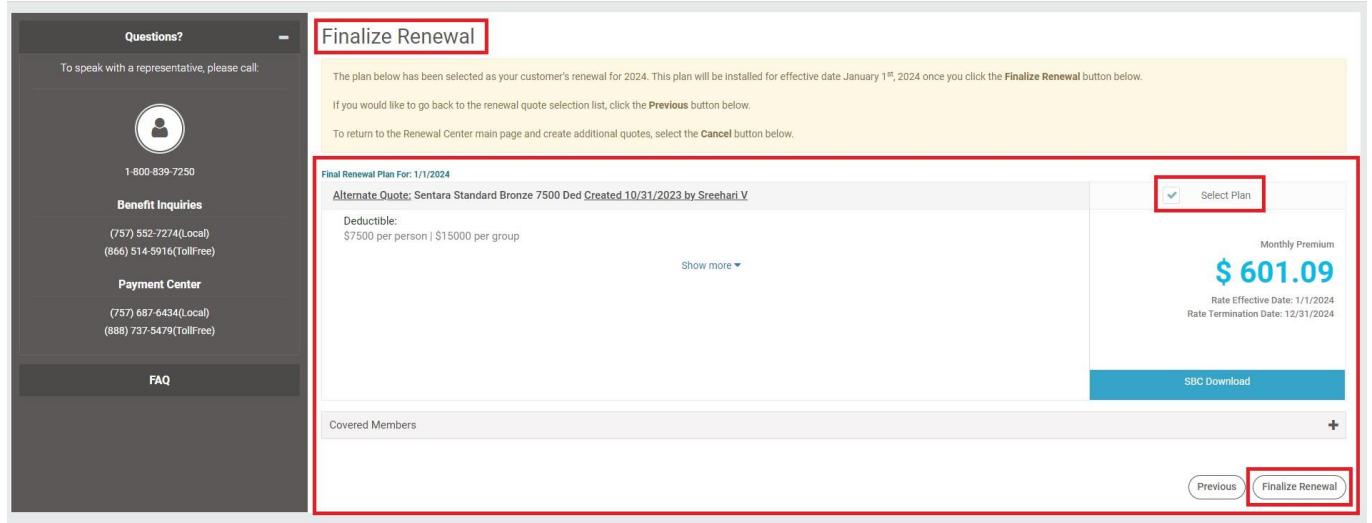
Alternate Quote 1

Alternate Quote: Sentara Standard Bronze 7500 Ded Created 10/31/2023 by Sreehari V		Monthly Premium
Coinsurance: 40%	Deductible: \$7500 per person \$15000 per group	\$ 601.09 Rate Effective Date: 1/1/2024 Rate Termination Date: 12/31/2024
SBC Download		

Covered Members

Next

You will be navigated to the final confirmation page as shown below. Double check on the plan and rate and then click on the 'Finalize Renewal' button to confirm the renewal for the upcoming plan year.



Finalize Renewal

The plan below has been selected as your customer's renewal for 2024. This plan will be installed for effective date January 1st, 2024 once you click the **Finalize Renewal** button below.

If you would like to go back to the renewal quote selection list, click the **Previous** button below.

To return to the Renewal Center main page and create additional quotes, select the **Cancel** button below.

Final Renewal Plan For: 1/1/2024

Alternate Quote: Sentara Standard Bronze 7500 Ded **Created 10/31/2023 by Sreehari V**

Select Plan

Monthly Premium **\$ 601.09**
 Rate Effective Date: 1/1/2024
 Rate Termination Date: 12/31/2024

SBC Download

Covered Members

Previous **Finalize Renewal**

10. Now, the selected customer is all set with the enrollment for renewal year.

6 Manage Off-Exchange Enrollment

6.1 Manage Member (Add/remove dependent)

Search for the customer from the **Customer** screen and drilldown on the customer name to navigate to the **Individual Details** screen.

Individual Details

Personal Information

Name: Brienne Michelle Farmer	Subscriber#: 1542504-01	Email: Brienne.Farmer@datamask.com
Status: Active	Renewal Date: 01/01/2023	Termination Date:
Phone: (721) 062-1234	Effective Date: 01/01/2022	Termination Reason:
Sponsor Id:	Customer#: F952587682	Association Name:

Additional Member Info +

Terminate

From the **Customer/Individual Details** screen, expand **Coverage** tab. Click on the **Plan Name** of the specific coverage for which you want to add or remove covered dependents.

Agent Quotes **Customers** Producers Agencies Bulk Termination Administration

Address Quotes Producer Renewal Center Renewal Documents FAQ

Additional Member Info +

PCP Details +

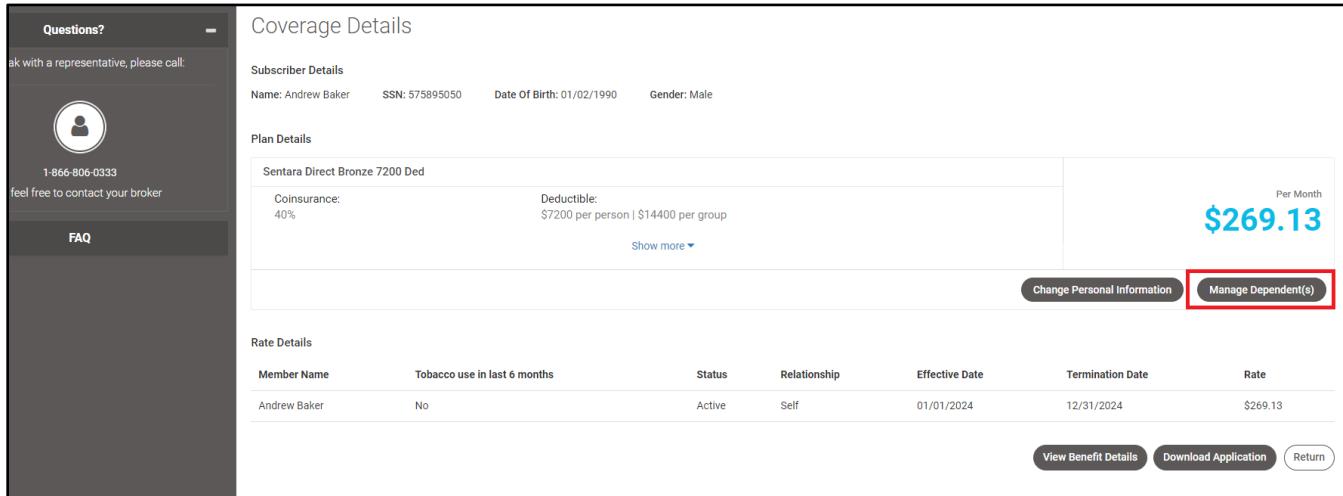
Coverage -

Active History

Plan	Effective Date	Termination Date
OptimaFit Silver 3500 30% Direct	01/01/2023	12/31/2023

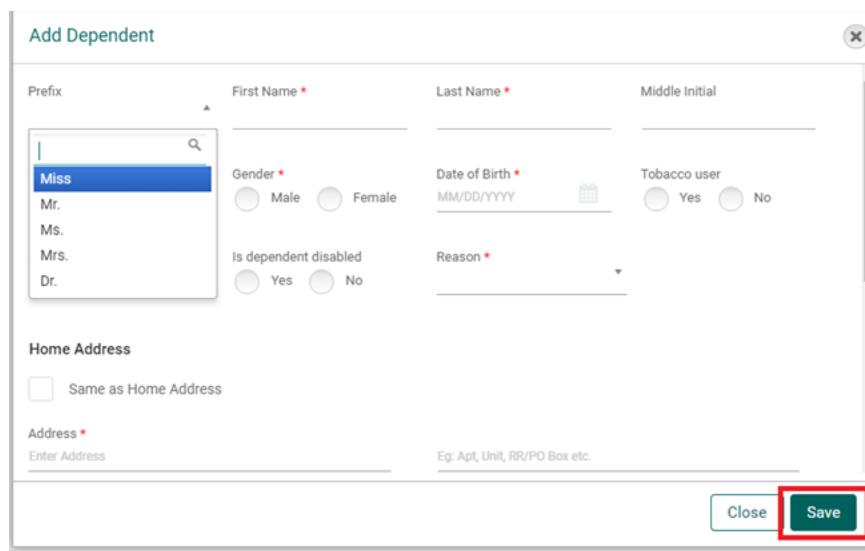
OptimaFit Silver 3500 30% Direct Change Coverage

Once the user navigates to **Plan Detail** screen, click on ‘**Manage Dependent(s)**’ button.



The screenshot shows the 'Plan Detail' screen. On the left, there's a sidebar with 'Questions?' and 'Ask with a representative, please call: 1-866-806-0333, feel free to contact your broker' and a 'FAQ' section. The main content area is titled 'Coverage Details' and shows 'Subscriber Details' (Name: Andrew Baker, SSN: 575895050, Date Of Birth: 01/02/1990, Gender: Male) and 'Plan Details' (Sentara Direct Bronze 7200 Ded, Coinsurance: 40%, Deductible: \$7200 per person | \$14400 per group, Premium: \$269.13 per month). Below this is a 'Rate Details' table with one row for Andrew Baker. At the bottom are buttons for 'Change Personal Information', 'Manage Dependent(s)' (which is highlighted with a red box), 'View Benefit Details', 'Download Application', and 'Return'.

On the **Manage Dependent** screen you will have the options to Add/Remove/Edit Spouse and Dependents. When you click on the **Add Dependents** button, the below popup gets displayed.



The 'Add Dependent' popup contains fields for 'Prefix' (dropdown with 'Miss' selected), 'First Name *', 'Last Name *', 'Middle Initial', 'Gender *' (radio buttons for Male and Female), 'Date of Birth *' (date input field with calendar icon), 'Tobacco user' (radio buttons for Yes and No), 'Is dependent disabled' (radio buttons for Yes and No), and 'Reason *' (text input field). Below these are sections for 'Home Address' with 'Same as Home Address' (checkbox) and 'Address *' (text input field with placeholder 'Enter Address'). At the bottom are 'Close' and 'Save' buttons, with 'Save' highlighted with a red box.

After entering the dependent details, click on the **Save** button to navigate back to **Manage Dependent** screen. Click on **Next** button to submit the process.

6.2 Change Coverage

User can change benefits through the Sentara Health Plans Portal by clicking on the **Change Coverage** button from the Coverage or Coverage Administration tab.

Search for the customer from the **Customer** screen and drilldown on the customer name to navigate to **Individual Details** screen.

Click on the 'Change Coverage' button either from the **Coverage** tab or **Coverage Administration** tab as shown in the below screenshot.

You will be navigated to the below screen. Review the information. Select appropriate Change Effective date and click the **Next** button.

Change Coverage

Plan: Sentara Standard Silver 5900 Ded Total Rate: \$374.65

Rate Effective Date: 01/01/2024

Rate Termination Date: 12/31/2024

Change Effective Date *

10/01/2023 11/01/2023 01/01/2024

i Coverage will be effective the first of the month after plan selection. If you have another qualifying event at the same time, such as a birth or adoption, coverage may be effective retroactively to the date of birth, adoption, or placement of the child.

Cancel **Next**

You will be navigated to the below screen to enter contact information and address details. Provide the required details and click on the **Next** button.

uat-sentara.benefit-test.com/Portal/Individual/ChangeCoverageSubscriberInfo

Agent Quotes **Customers** Producers Agencies Bulk Termination Administration

Virginia's Insurance Marketplace

To speak with a representative, please call:  1-866-806-0333 or feel free to contact your broker

FAQ

Account Holder Information

First Name Phillip	Last Name Baxter	Gender Male	Date Of Birth 01/01/1985
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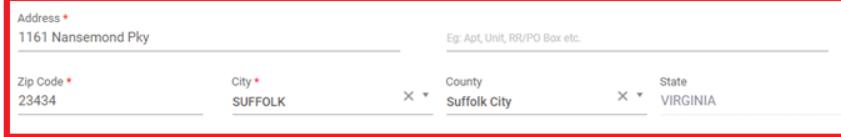
Contact Information

Phone (703) 964-1872	Email phillip@yopmail.com
-------------------------	------------------------------

Home Address

Address * 1161 Nansemond Pky	Eg: Apt, Unit, RR/PO Box etc.		
Zip Code * 23434	City * SUFFOLK	County Suffolk City	State VIRGINIA

Cancel **Next**




You will be navigated to the dependent information screen as shown below. You will be able to add spouse from the coverage and also add dependent from the coverage by clicking the highlighted buttons. After entering the information, click on the **See Plans** button.

uat-sentara.benefit-test.com/Portal/Individual/CoveredDependents

Agent Quotes **Customers** Producers Agencies Bulk Termination Administration

Virginia's Insurance Marketplace

Questions?  To speak with a representative, please call: 1-866-806-0333 or feel free to contact your broker

FAQ

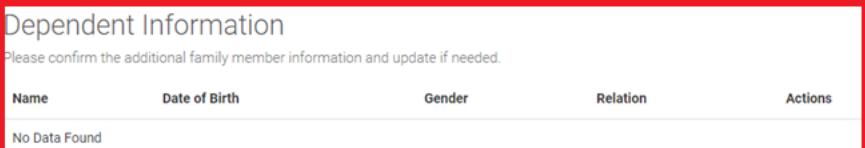
Dependent Information

Please confirm the additional family member information and update if needed.

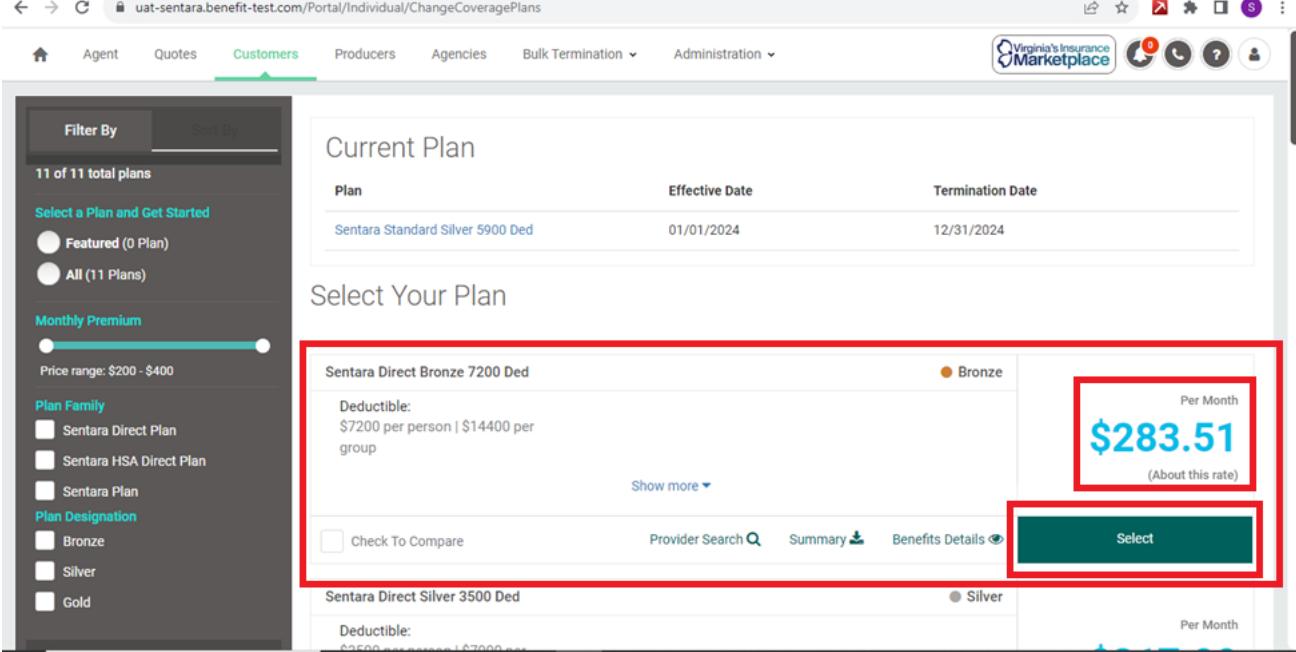
Name	Date of Birth	Gender	Relation	Actions
No Data Found				

Add Spouse **Add Dependent**

Previous **Cancel** **See Plans**




The system will display the plan listing page with the list of all available plans as shown in the below screen. Choose a plan and click on the **Select** button and click **Next** button.



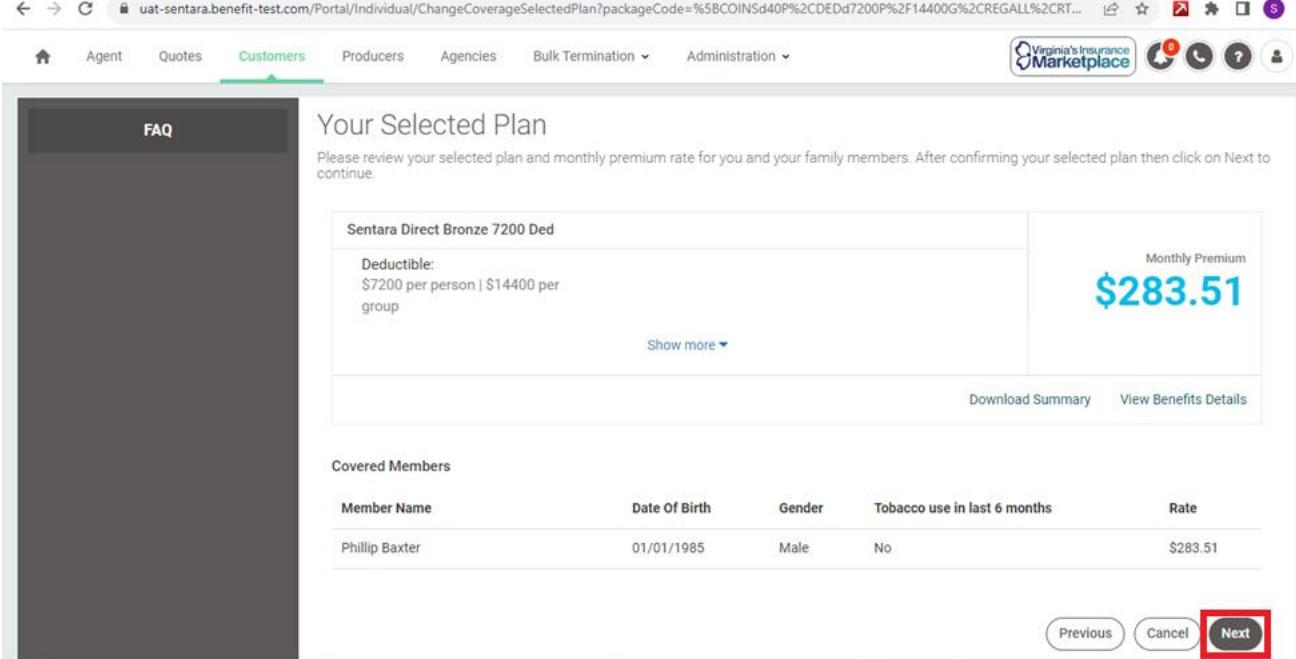
Current Plan

Plan	Effective Date	Termination Date
Sentara Standard Silver 5900 Ded	01/01/2024	12/31/2024

Select Your Plan

Sentara Direct Bronze 7200 Ded	● Bronze	Per Month \$283.51 (About this rate)
Deductible: \$7200 per person \$14400 per group		
<input type="checkbox"/> Check To Compare	Provider Search	Summary
		Benefits Details
Sentara Direct Silver 3500 Ded	● Silver	Per Month
Deductible: \$3500 per person \$7000 per group		

You will be navigated to the Plan confirmation page as shown below and click **Next** button.



Your Selected Plan

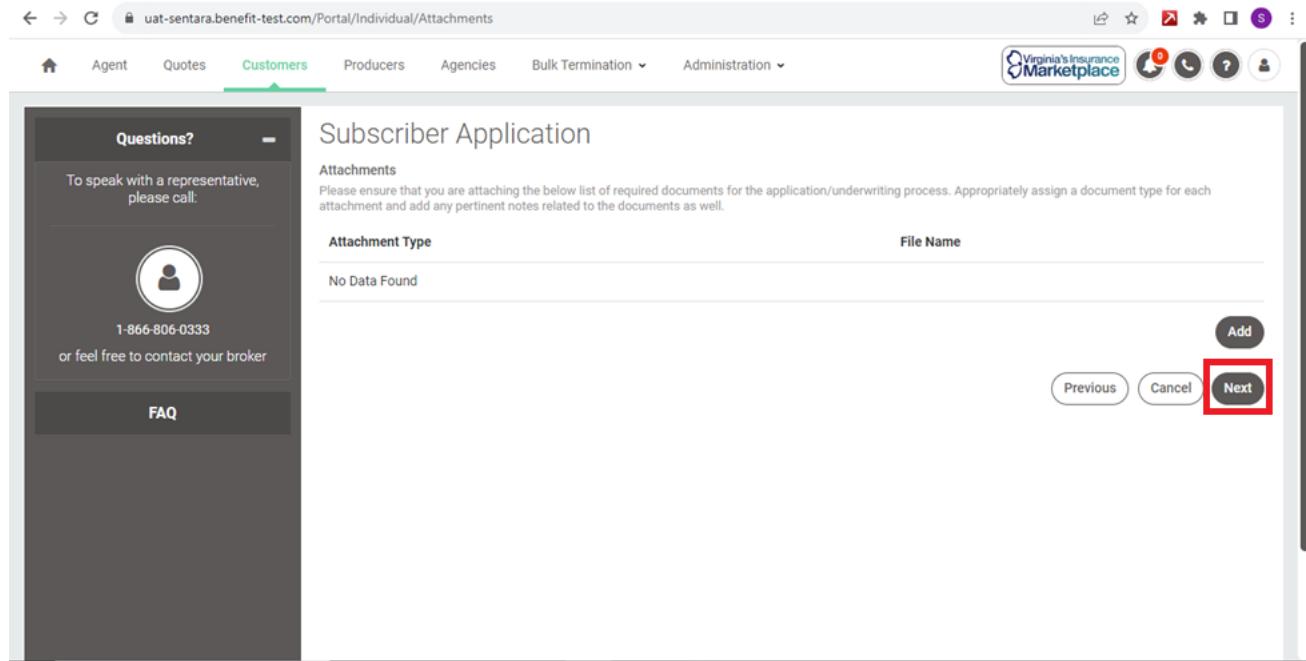
Please review your selected plan and monthly premium rate for you and your family members. After confirming your selected plan then click on Next to continue.

Sentara Direct Bronze 7200 Ded	Monthly Premium \$283.51
Deductible: \$7200 per person \$14400 per group	
<input type="checkbox"/> Show more	
	Download Summary View Benefits Details

Covered Members

Member Name	Date Of Birth	Gender	Tobacco use in last 6 months	Rate
Phillip Baxter	01/01/1985	Male	No	\$283.51

You will be navigated to the Attachment screen. Please upload all the supporting document as the attachment and then click on the **Next** button.



Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Subscriber Application

Attachments

Please ensure that you are attaching the below list of required documents for the application/underwriting process. Appropriately assign a document type for each attachment and add any pertinent notes related to the documents as well.

Attachment Type	File Name
No Data Found	

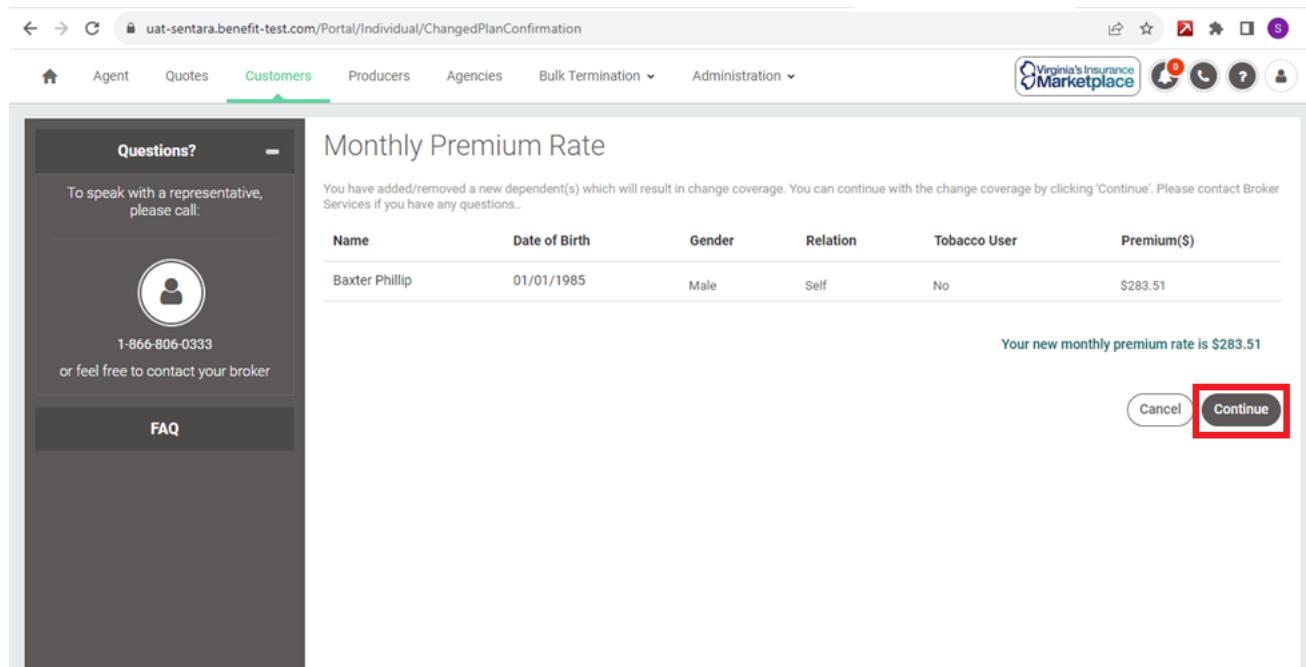
Add

Previous

Cancel

Next

You will be navigated to the Monthly Premium Rate display page. Review the information and then click on the **Continue** button.



Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Monthly Premium Rate

You have added/removed a new dependent(s) which will result in change coverage. You can continue with the change coverage by clicking 'Continue'. Please contact Broker Services if you have any questions..

Name	Date of Birth	Gender	Relation	Tobacco User	Premium(\$)
Baxter Phillip	01/01/1985	Male	Self	No	\$283.51

Your new monthly premium rate is \$283.51

Cancel

Continue

You will be navigated to the Confirmation of Submission page. Click on the **Finish** button to complete the Change Coverage process.

uat-sentara.benefit-test.com/Portal/Individual/SubmitChangeCoverage

Agent Quotes Customers Producers Agencies Bulk Termination Administration

Virginia's Insurance Marketplace

Change Coverage

Confirmation of Submission

Description

If there are any questions related to your application, you will be contacted via the e-mail address of the primary contact submitted. If you have any questions or concerns, you may contact us at '1-866-806-0333'. The system should provide user, the following functionality/Options on Submitted Application.

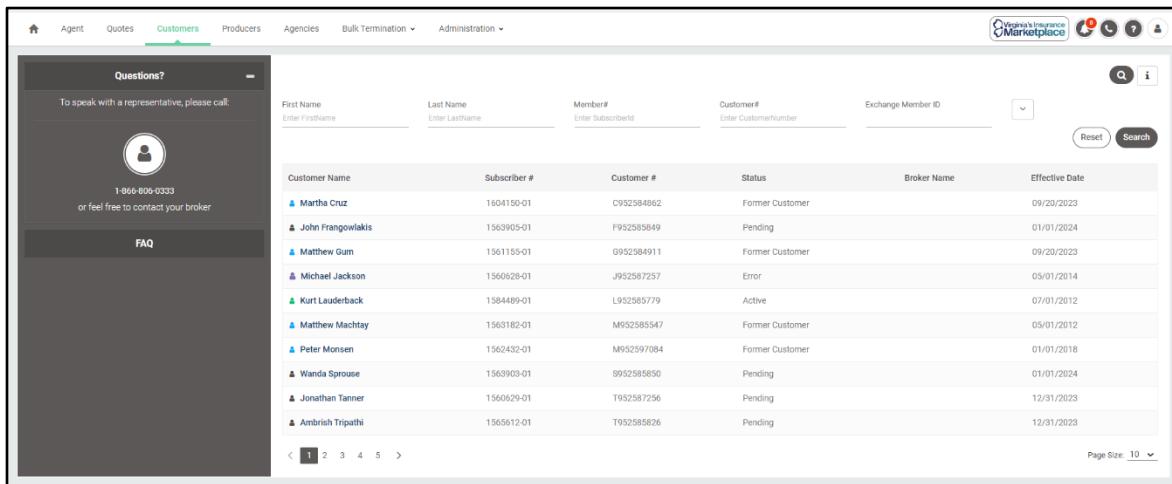
Finish

7 Customers Tab

The central hub of the application is the customer screen. This screen displays a comprehensive repository of customer information, accessible to all Sentara users. This screen is accessible to Brokers as well, but the list of customers they see would be limited to their own customers.

7.1 Customers Listing Screen

1. When the user clicks on a customer's name from the below list, the system seamlessly directs them to the Customer Details screen (Refer to [section 7.2](#)). The customer detail screen provides in-depth information about the selected customer.

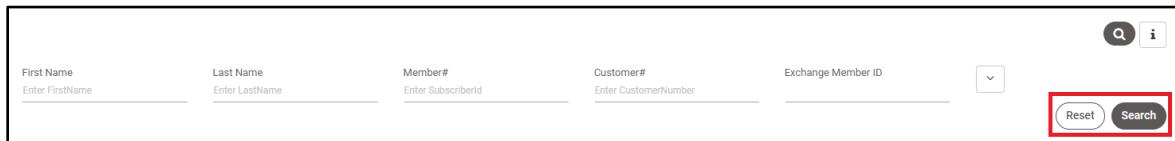


The screenshot shows the 'Customers' tab selected in the top navigation bar. On the left, there is a sidebar with 'Questions?' (with a phone icon), '1-866-806-0333', and 'or feel free to contact your broker'. Below that is an 'FAQ' section. The main content area has search fields for 'First Name', 'Last Name', 'Member#', 'Customer#', and 'Exchange Member ID'. A 'Search' button is located to the right of these fields. Below the search area is a table listing 10 customers. The columns are 'Customer Name', 'Subscriber #', 'Customer #', 'Status', 'Broker Name', and 'Effective Date'. Each customer row has a small blue triangle icon and a link to the customer's name. At the bottom of the table are page navigation buttons (1-5) and a 'Page Size: 10' dropdown.

Customer Name	Subscriber #	Customer #	Status	Broker Name	Effective Date
Martha Cruz	1604150-01	C952584962	Former Customer		09/20/2023
John Frangoulakis	1563905-01	F952585849	Pending		01/01/2024
Matthew Gun	1561155-01	G952584911	Former Customer		09/20/2023
Michael Jackson	1560928-01	J952587257	Error		05/01/2014
Kurt Lauderback	1564489-01	L952585779	Active		07/01/2012
Matthew Machta	1563182-01	M952585547	Former Customer		05/01/2012
Peter Monsen	1562432-01	M952597084	Former Customer		01/01/2018
Wanda Sprouse	1563903-01	S952585850	Pending		01/01/2024
Jonathan Tanner	1560929-01	T952587256	Pending		12/31/2023
Ambrish Tripathi	1565612-01	T952585826	Pending		12/31/2023

User can click the **Reset** button to clear all inputted text from the search fields.

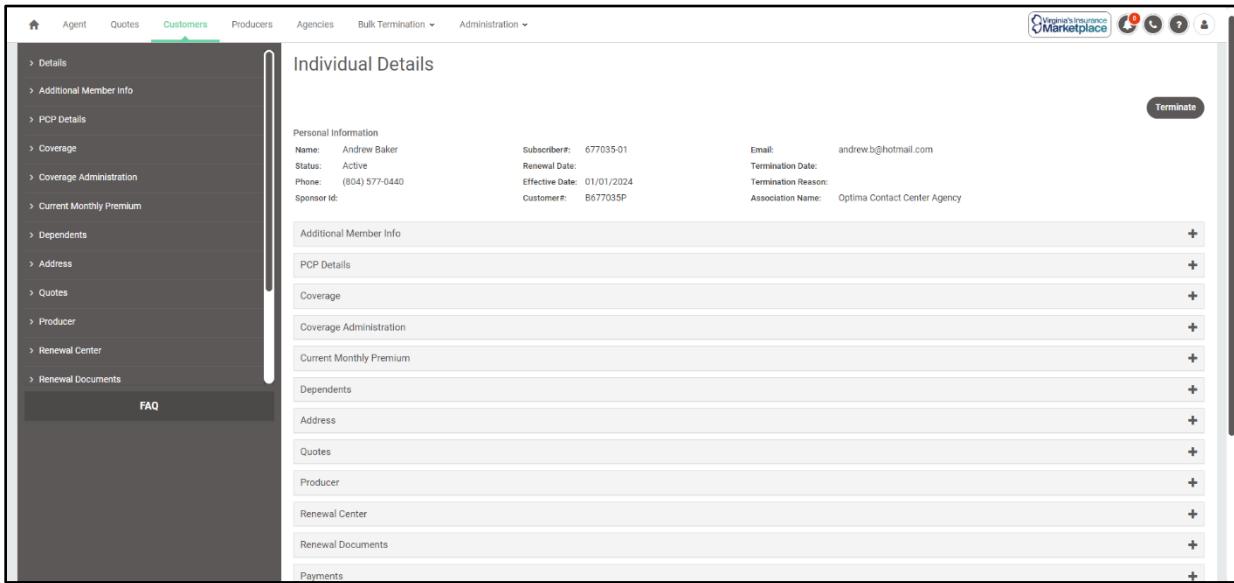
User can click the **Search** button to initiate filtering by search fields inputted.



This screenshot shows the same interface as the previous one, but with a red box highlighting the 'Search' button in the bottom right corner of the search field area.

7.2 Customer Details

On the Customer Detail Screen, users can seamlessly view and administer the specifics of the selected customer. This encompasses examining additional information regarding customers, details about dependents, and a comprehensive history of coverage. Additionally, users can delve into responsible person details related to Child Only policies, explore the Renewal Center to view renewal plans, and conveniently access renewal documents. The screen also serves as a centralized repository for managing essential notes and documents, facilitating efficient customer information management. In the subsequent sections below, we will go over details of each sub-sections of the screen (called accordions).



The screenshot shows the 'Individual Details' section of the Customer Details screen. The sidebar on the left contains a tree view of customer information, with 'Additional Member Info' expanded. The main content area displays personal information for a subscriber named Andrew Baker, including Name, Status, Phone, and Sponsor ID. Below this, a list of expandable accordions includes 'Additional Member Info', 'PCP Details', 'Coverage', 'Coverage Administration', 'Current Monthly Premium', 'Dependents', 'Address', 'Quotes', 'Producer', 'Renewal Center', 'Renewal Documents', and 'FAQ'. Each accordion has a '+' sign to its right, indicating it can be expanded to show more details.

7.3 Additional Member Info

Access: This section displays additional details about the customers. This section is accessible only to the Sentara users. Though external brokers would have access to the main Customers screen, this additional member info section is not accessible to brokers.

Additional Member Info

Edit

Member Identification		Enrollment Details	
Customer Number:	B677035P	Status:	Active
Prefix:		Effective Date:	01/01/2024
First Name:	Andrew	Termination Date:	
Middle Name:		Renewal Date:	
Last Name:	Baker	Reinstate Date:	
Suffix:		Reinstate Reason:	
DOB:	01/02/1990	Termination Reason:	
Gender:	Male	SEP Reason:	
Tobacco Use in the last 6 months:	No	Child Only Policy Flag:	No
Disabled:	No	Member Type:	Subscriber
Marital Status:	Single	Customer Type:	Individual
US Citizen:	Yes	Relation:	Self
SSN:	575895050	Online Login ID:	
Exchange Member ID:		Rating Region:	
Member Number:	677035-01	Rating Area Effective Date:	
Group Number:	I677035	Effectuation Date:	
		Effectuation Flag	No
Contact Information			
Work Phone #:	(804) 577-0440		
Home Phone#:			
Cell Phone#:			
Email:	andrew.b@hotmail.com		

7.4 PCP Details

Access: This section is accessible only to Sentara users.

This section displays the Primary Care Provider details of the selected customer.

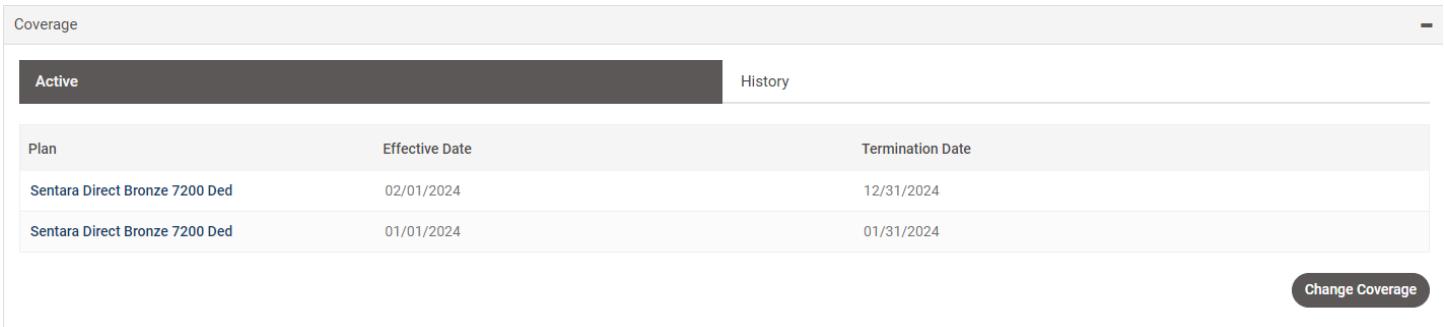
PCP Details

PCP #:	
PCP First Name:	
PCP Last Name:	
PCP Phone Number:	

7.5 Coverage

Access: This section is accessible to both Brokers and Sentara Users.

In this section the user will find an overview of coverages associated with the selected customer. The presentation is organized into two distinct tabs: one for currently active coverages and another for historical coverages.



The screenshot shows a user interface for managing customer coverages. At the top, a header bar says "Coverage". Below it, there are two tabs: "Active" (which is selected and highlighted in dark grey) and "History". The main content area displays a table with two rows of coverage information. The columns are "Plan", "Effective Date", and "Termination Date". The first row shows "Sentara Direct Bronze 7200 Ded" with an effective date of "02/01/2024" and a termination date of "12/31/2024". The second row shows "Sentara Direct Bronze 7200 Ded" with an effective date of "01/01/2024" and a termination date of "01/31/2024". At the bottom right of the table area is a dark grey button labeled "Change Coverage".

Plan	Effective Date	Termination Date
Sentara Direct Bronze 7200 Ded	02/01/2024	12/31/2024
Sentara Direct Bronze 7200 Ded	01/01/2024	01/31/2024

Change Coverage

Active Tab:

On this tab, the user will find a compilation of active coverage periods for the current plan year. Multiple coverage spans may appear in instances where the user has made changes to their coverage within the current year.

If there are no active coverage for the current year, then the system will display a message - “Your enrollment is either incomplete, pending or under review at this time. Please check your application status in the **Shop for Plans** section, click **My Quotes** and then the **Quote#** for more details.”

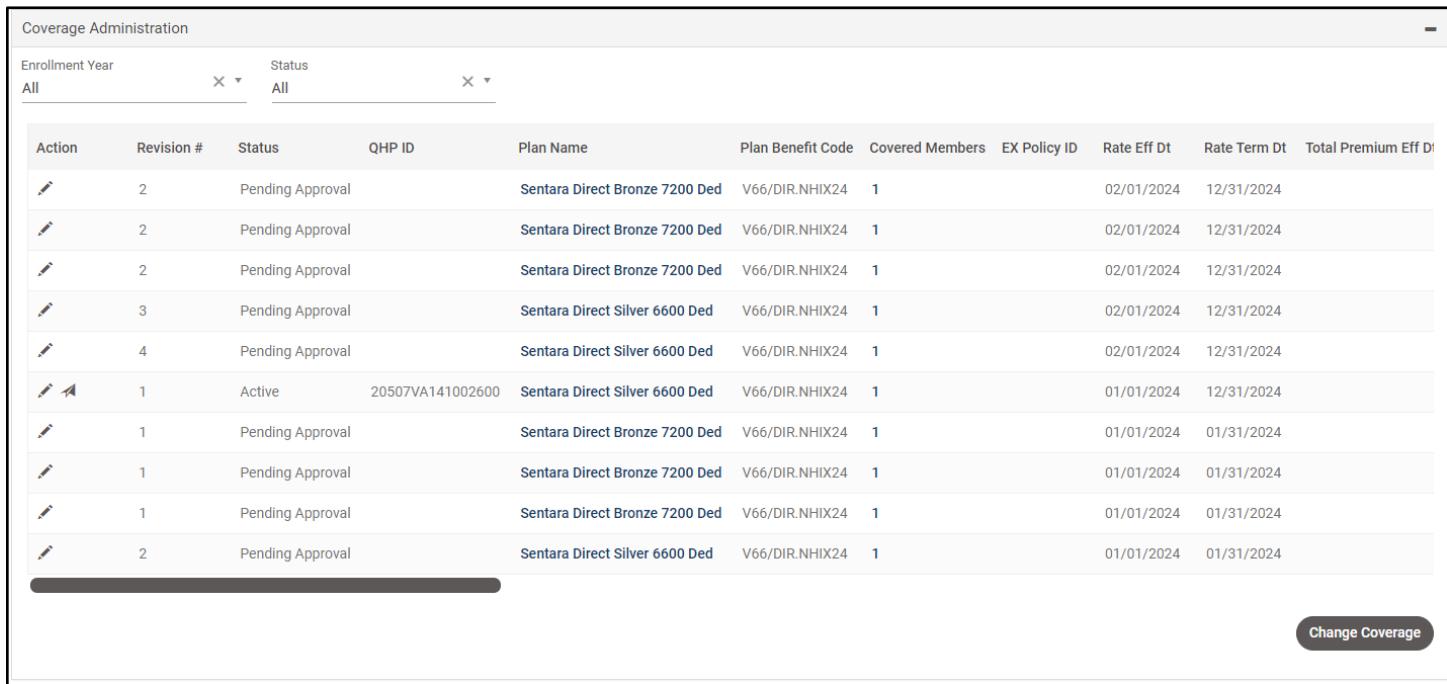
History Tab:

On this tab, the user will find a compilation of coverages since the time the customer is associated with Sentara.

7.6 Coverage Administration

Access: This section is accessible only to Sentara users.

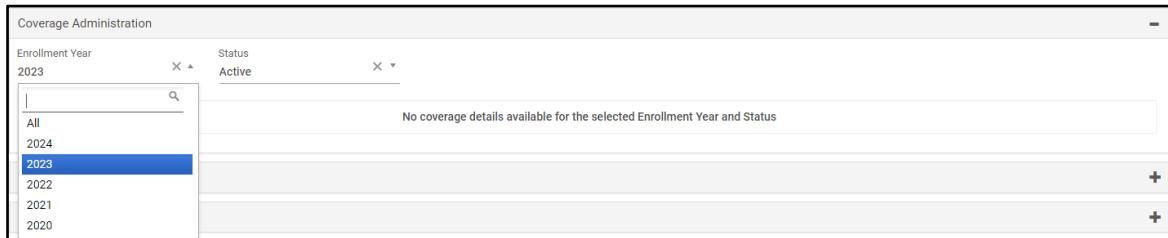
Exactly similar to Coverages accordion detailed out in section 7.5, this Coverage Administration accordion also display the coverages enrolled by the subscriber for different plan year. In addition to that this a lot more additional information about the coverages can be viewed in this section that includes different type of rates, rate effective dates, status, etc.



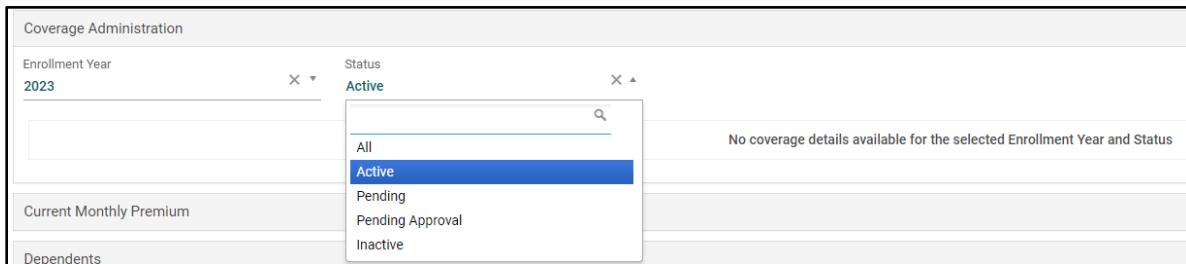
Action	Revision #	Status	QHP ID	Plan Name	Plan Benefit Code	Covered Members	EX Policy ID	Rate Eff Dt	Rate Term Dt	Total Premium Eff Dt
	2	Pending Approval		Sentara Direct Bronze 7200 Ded	V66/DIR.NHIX24	1		02/01/2024	12/31/2024	
	2	Pending Approval		Sentara Direct Bronze 7200 Ded	V66/DIR.NHIX24	1		02/01/2024	12/31/2024	
	2	Pending Approval		Sentara Direct Bronze 7200 Ded	V66/DIR.NHIX24	1		02/01/2024	12/31/2024	
	3	Pending Approval		Sentara Direct Silver 6600 Ded	V66/DIR.NHIX24	1		02/01/2024	12/31/2024	
	4	Pending Approval		Sentara Direct Silver 6600 Ded	V66/DIR.NHIX24	1		02/01/2024	12/31/2024	
	1	Active	20507VA141002600	Sentara Direct Silver 6600 Ded	V66/DIR.NHIX24	1		01/01/2024	12/31/2024	
	1	Pending Approval		Sentara Direct Bronze 7200 Ded	V66/DIR.NHIX24	1		01/01/2024	01/31/2024	
	1	Pending Approval		Sentara Direct Bronze 7200 Ded	V66/DIR.NHIX24	1		01/01/2024	01/31/2024	
	2	Pending Approval		Sentara Direct Silver 6600 Ded	V66/DIR.NHIX24	1		01/01/2024	01/31/2024	

Change Coverage

From the Enrollment Year filter, the user can choose the year. The system will display all the coverages specific to that enrollment year. User may choose to select ‘All’ option to display all coverages across all enrollment years.



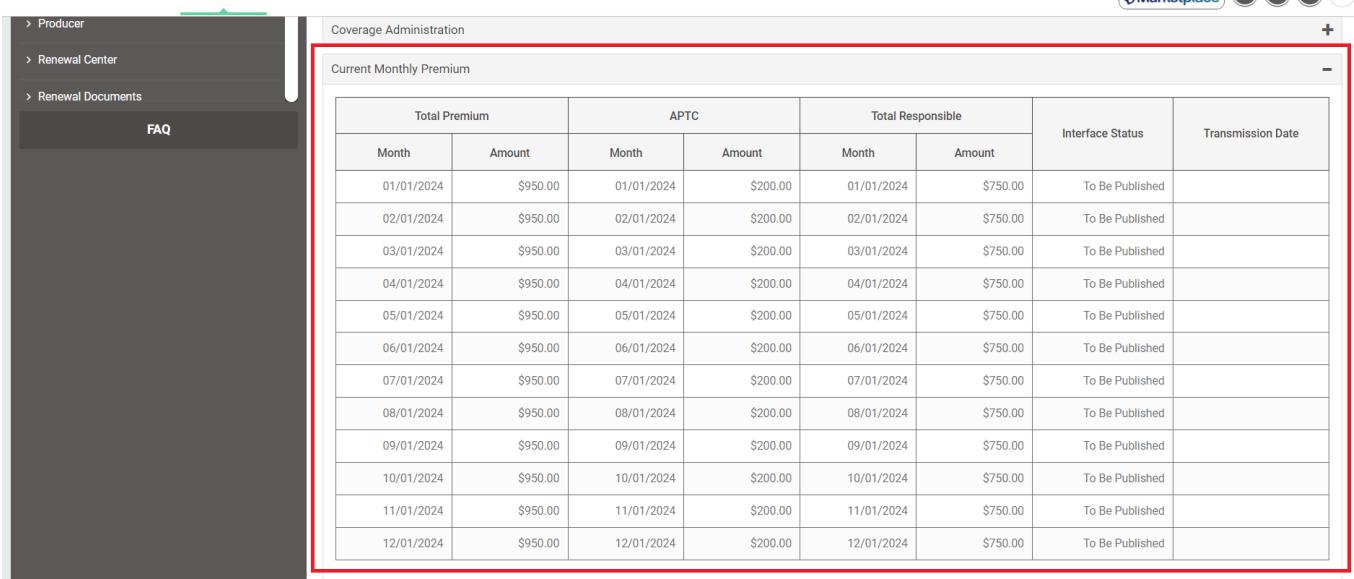
1. The filter in the Coverage Administration accordion works in combination with both Enrollment Year and Status. Assume, the user wants to see all the Active coverage for a specific year, then then user will have to select the particular Enrollment Year and also select the status as ‘Active’. In addition to the ‘Active’ status, the Status filter allows filtering by other statuses like ‘Pending’, ‘Pending Approval’, and ‘Inactive’.



7.7 Current Monthly Premium

Access: This section is accessible only to Sentara users.

This accordion is applicable only for State Exchange enrollments. Not applicable for Off-Exchange and FFM enrollments. The state exchange sends out expected monthly premium to be collected from the customers based on the user's coverage. The financial information sent by state exchange get displayed here.



The screenshot shows the 'Customers' tab selected in the top navigation bar. The 'Current Monthly Premium' section is highlighted with a red border. The table contains 12 rows, each representing a month from January 2024 to December 2024. The columns are: Month, Total Premium, Month, APTC, Month, Total Responsible, Interface Status, and Transmission Date. All rows show a Total Premium of \$950.00, an APTC of \$200.00, and a Total Responsible of \$750.00. The Interface Status is 'To Be Published' and the Transmission Date is blank.

Total Premium		APTC		Total Responsible		Interface Status	Transmission Date
Month	Amount	Month	Amount	Month	Amount		
01/01/2024	\$950.00	01/01/2024	\$200.00	01/01/2024	\$750.00	To Be Published	
02/01/2024	\$950.00	02/01/2024	\$200.00	02/01/2024	\$750.00	To Be Published	
03/01/2024	\$950.00	03/01/2024	\$200.00	03/01/2024	\$750.00	To Be Published	
04/01/2024	\$950.00	04/01/2024	\$200.00	04/01/2024	\$750.00	To Be Published	
05/01/2024	\$950.00	05/01/2024	\$200.00	05/01/2024	\$750.00	To Be Published	
06/01/2024	\$950.00	06/01/2024	\$200.00	06/01/2024	\$750.00	To Be Published	
07/01/2024	\$950.00	07/01/2024	\$200.00	07/01/2024	\$750.00	To Be Published	
08/01/2024	\$950.00	08/01/2024	\$200.00	08/01/2024	\$750.00	To Be Published	
09/01/2024	\$950.00	09/01/2024	\$200.00	09/01/2024	\$750.00	To Be Published	
10/01/2024	\$950.00	10/01/2024	\$200.00	10/01/2024	\$750.00	To Be Published	
11/01/2024	\$950.00	11/01/2024	\$200.00	11/01/2024	\$750.00	To Be Published	
12/01/2024	\$950.00	12/01/2024	\$200.00	12/01/2024	\$750.00	To Be Published	

7.8 Dependents

Access: This section is accessible to both Brokers and Sentara users.

This accordion displays all the dependent details of the selected customer.



The screenshot shows the 'Dependents' section. The table contains 3 rows of data. The columns are: Actions, Name, Date of Birth, Gender, Relation, SSN, Member #, Ex Member ID, and Status. The data shows three dependents: Connor Monsen (Male, Child/Dependent, 099-94-2194, 1562432-04, Terminated), Kaillee Monsen (Female, Child/Dependent, 099-94-0779, 1562432-03, Terminated), and Patricia Monsen (Female, Spouse, 125-62-7890, 1562432-02, Terminated).

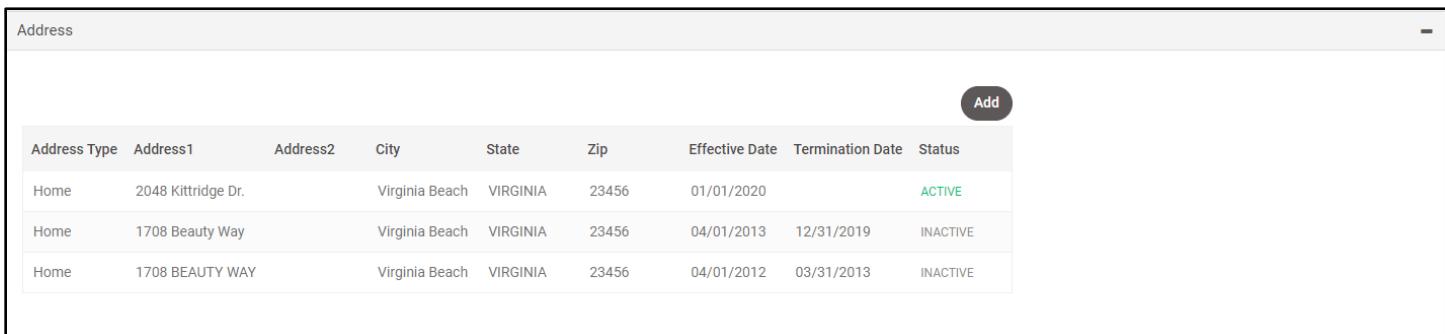
Actions	Name	Date of Birth	Gender	Relation	SSN	Member #	Ex Member ID	Status
	Connor Monsen	03/20/2005	Male	Child/Dependent	099-94-2194	1562432-04		Terminated
	Kaillee Monsen	03/20/2005	Female	Child/Dependent	099-94-0779	1562432-03		Terminated
	Patricia Monsen	03/27/1963	Female	Spouse	125-62-7890	1562432-02		Terminated

7.9 Address

Access: This section is accessible to both Brokers and Sentara users.

This accordion displays the current and historical Home and Mailing addresses of the selected customer.

You can add a new address by clicking on the **Add** button.



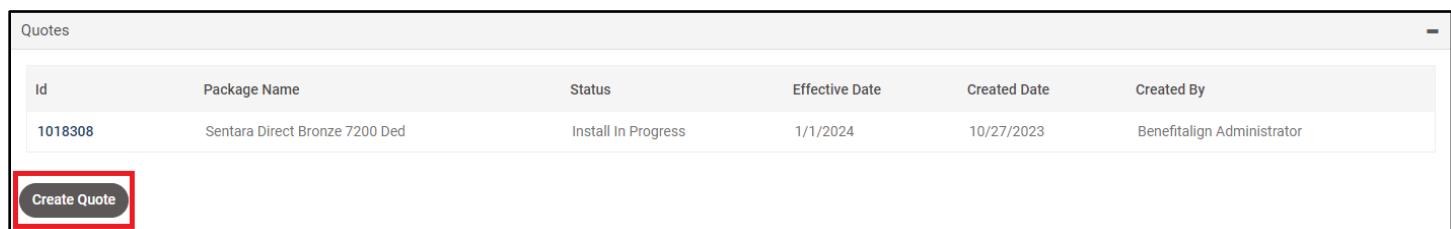
Address Type	Address1	Address2	City	State	Zip	Effective Date	Termination Date	Status
Home	2048 Kittridge Dr.		Virginia Beach	VIRGINIA	23456	01/01/2020		ACTIVE
Home	1708 Beauty Way		Virginia Beach	VIRGINIA	23456	04/01/2013	12/31/2019	INACTIVE
Home	1708 BEAUTY WAY		Virginia Beach	VIRGINIA	23456	04/01/2012	03/31/2013	INACTIVE

7.10 Quotes

Access: This section is accessible to both Brokers and Sentara users.

This accordion displays all the quotes created by the Broker or the Sentara user.

Additionally, the user can click on the 'Create Quote' button to create new quotes.



Id	Package Name	Status	Effective Date	Created Date	Created By
1018308	Sentara Direct Bronze 7200 Ded	Install In Progress	1/1/2024	10/27/2023	Benefitalign Administrator

Create Quote

7.11 Producer

Access: This section is accessible to Sentara users only.

This accordion displays the producer (Broker on Record) associated with the selected customer. Also, users can see a history of different producers associated to the selected customers. The Relationship Effective Date indicates the date when the producer got associated with the selected customer. The Relationship Termination Date indicates the date when the producer got disassociated with the selected customer.

For on-exchange customers, the producer relationship details come from the EDI 834 file. For off-exchange customers, the broker gets associated at the time of enrollment process.

Additionally, the Sentara users can associate a new producer by following below steps.

Producer							
First Name	Last Name	NPN	Relationship Effective Date	Relationship Term Date	Agency Name	Agency Number	Agency Vendor Number
Kristin	Watts		04/01/2012	08/02/2013	Layman Diener & Borntrager Ins. Agency	0015Y00002wZt05QAC	58803

Adding New Producer to the customer:

1. Click on the 'Add' button from the Producer accordion.
2. The system displays the Add Producer pop-up as shown below. Associating another producer to a customer profile can be done through manually searching and associating a new producer through this pop-up window. Enter the **Effective Date** from when the new producer needs to be associated to the customer. Users can search for the producer details by providing various search criteria as shown in below screenshot. Clicking the **Search** button will display the list of all the matching producers to choose from and associate.

Add Producer

Effective Date MM/DD/YYYY <input type="button" value="Calendar"/>	First Name <input type="text"/>	Last Name <input type="text"/>	NPN <input type="text"/>	Agency Number <input type="text"/>
Agency Name <input type="text"/>	Vendor Number <input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Reset"/>	
<input type="button" value="Close"/>	<input type="button" value="Save"/>			

3. Choose the producer and click Save button as shown in below screenshot.

Add Producer

	First Name	Last Name	NPN	Agency Name	Agency Number	Agency Vendor Number
<input checked="" type="checkbox"/>	John	Roman		Connexions Inc	3658	
<input type="checkbox"/>	John	Arnold		Connexions Inc	3658	
<input type="checkbox"/>	John	Woleben	633856	Friedman and Associates	0015Y00002wZsulQAC	13694
<input type="checkbox"/>	John	Hinck III	3105095	John Hinck III	0015Y00002wa0yhQAA	14097
<input type="checkbox"/>	John	Reigle	2484999	Parker & Reigle Insurance Agency	0015Y00002wa0zxQAA	14887

7.12 Renewal Center

Access: This section is accessible to both Brokers and Sentara users.

This accordion gets displayed only during the Open Enrollment Period.

Users can view the renewal plan and rate information for the selected customer in this accordion. Upon consent from the customer, brokers or the Sentara users may choose to finalize the renewal on behalf of the customer. Refer to the below sections for details on the renewal finalization scenarios –

Section 4.3 Manage Renewals (On-exchange Passive Renewal Quote/Plan finalization)

Section 5.3 Manage Renewals (Off-Exchange Passive Renewal Quote/Plan finalization)

Section 5.4 Manage Renewals (Off-Exchange Alternate Renewal Quote/Plan finalization)

7.13 Renewal Documents

Access: This section is accessible to both Brokers and Sentara users.

This accordion displays the renewal letter that was sent to the customer as part of the renewal packet.

User will be able to click on the filename hyperlink to download/view the renewal letter.

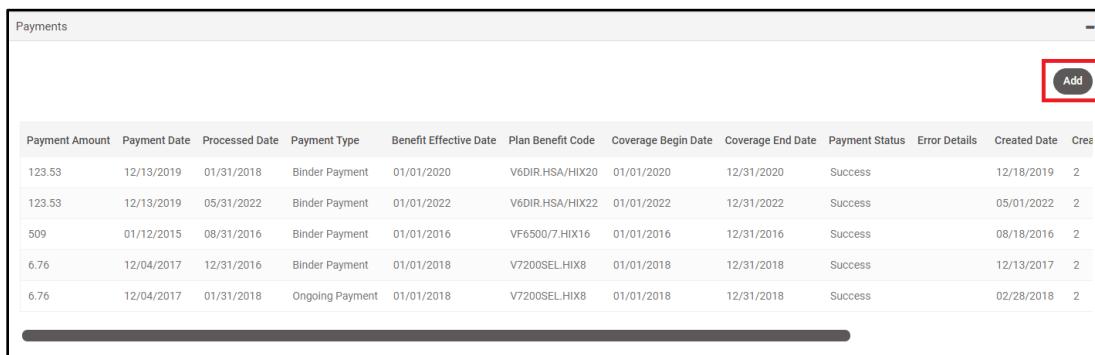
Renewal Documents		
File Name	Document Type	Plan Year
RenewalLetter_1-19124148764_20507VA141006901-20507VA141006901_C952485993.pdf	Renewal Notification Letter	2024

7.14 Payments

Access: This section is accessible to Sentara users only.

This accordion displays the binder payments received from CSC as the data feed.

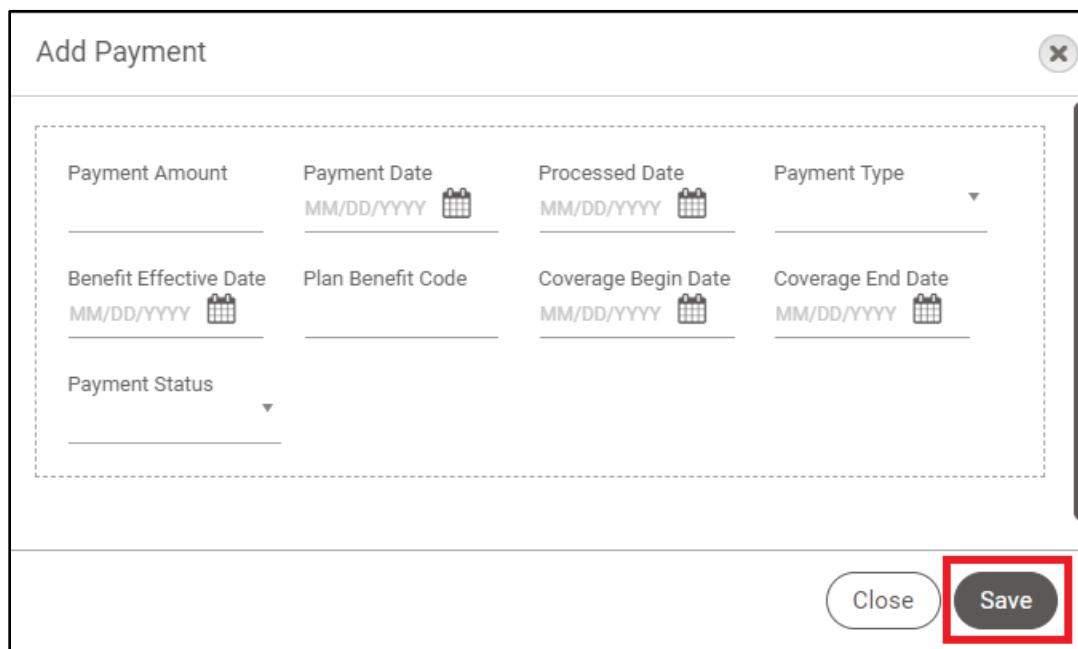
Sentara users (with Carrier Admin role) can add the binder payment details manually by clicking the 'Add' button.



The screenshot shows a table of binder payments with the following data:

Payment Amount	Payment Date	Processed Date	Payment Type	Benefit Effective Date	Plan Benefit Code	Coverage Begin Date	Coverage End Date	Payment Status	Error Details	Created Date	Created By
123.53	12/13/2019	01/31/2018	Binder Payment	01/01/2020	V6DIR.HSA/HIX20	01/01/2020	12/31/2020	Success		12/18/2019	2
123.53	12/13/2019	05/31/2022	Binder Payment	01/01/2022	V6DIR.HSA/HIX22	01/01/2022	12/31/2022	Success		05/01/2022	2
509	01/12/2015	08/31/2016	Binder Payment	01/01/2016	VF6500/7.HIX16	01/01/2016	12/31/2016	Success		08/18/2016	2
6.76	12/04/2017	12/31/2016	Binder Payment	01/01/2018	V7200SEL.HIX8	01/01/2018	12/31/2018	Success		12/13/2017	2
6.76	12/04/2017	01/31/2018	Ongoing Payment	01/01/2018	V7200SEL.HIX8	01/01/2018	12/31/2018	Success		02/28/2018	2

2. The user will have to fill in all the payment related information in the below **Add Payment** Popup and click the Save button.

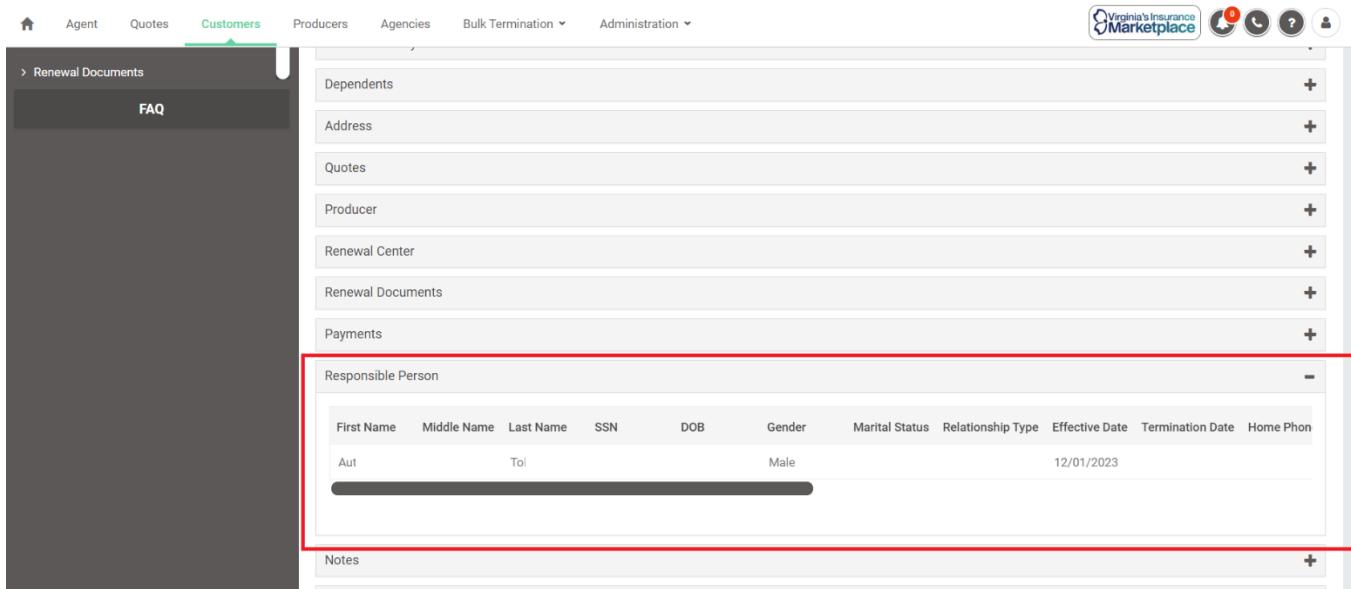


The screenshot shows the 'Add Payment' form with the following fields:

Payment Amount	Payment Date	Processed Date	Payment Type
MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	▼
Benefit Effective Date	Plan Benefit Code	Coverage Begin Date	Coverage End Date
MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY
Payment Status	▼		
Save			

7.15 Responsible Person

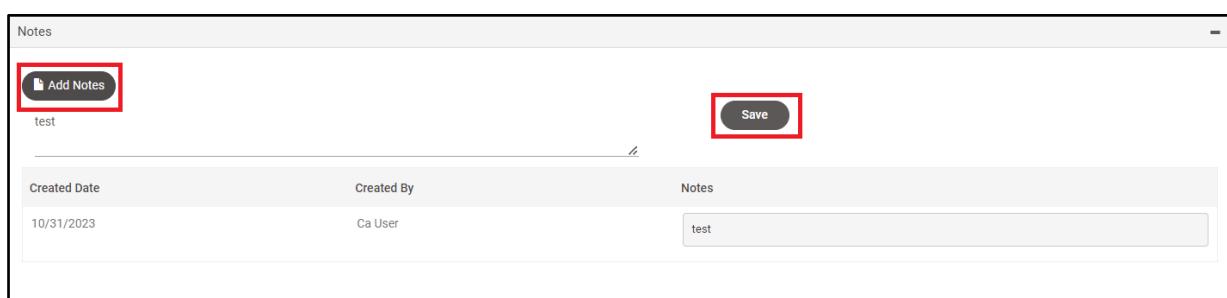
1. Access: This section is accessible to Sentara users only.
2. Responsible person information is applicable only for Child Only Policy Enrollments. The users can view the responsible person contact information of the selected customer.
3. Users can click on the 'Add' button to add a new responsible person, as needed.



First Name	Middle Name	Last Name	SSN	DOB	Gender	Marital Status	Relationship Type	Effective Date	Termination Date	Home Phon
Aut	Tol	Male		12/01/2023						

7.16 Notes

1. Access: This section is accessible to Sentara users only
2. Users can manage their Notes specific to the selected customer in this accordion.
3. For adding notes, click **Add Notes** button, enter the note and then click the **Save** button.



Created Date	Created By	Notes
10/31/2023	Ca User	test

7.17 Documents

1. Access: This section is accessible to Sentara users only
2. Users can manage the Documents (Attachments) of the selected customer in this accordion.
3. To add a new document, click on the **Add Document** button, choose the type of document and click the Choose File button to upload the file. Click the Save button.

Documents

Add Document

Document Type *

Document *

Choose File No file chosen

Save

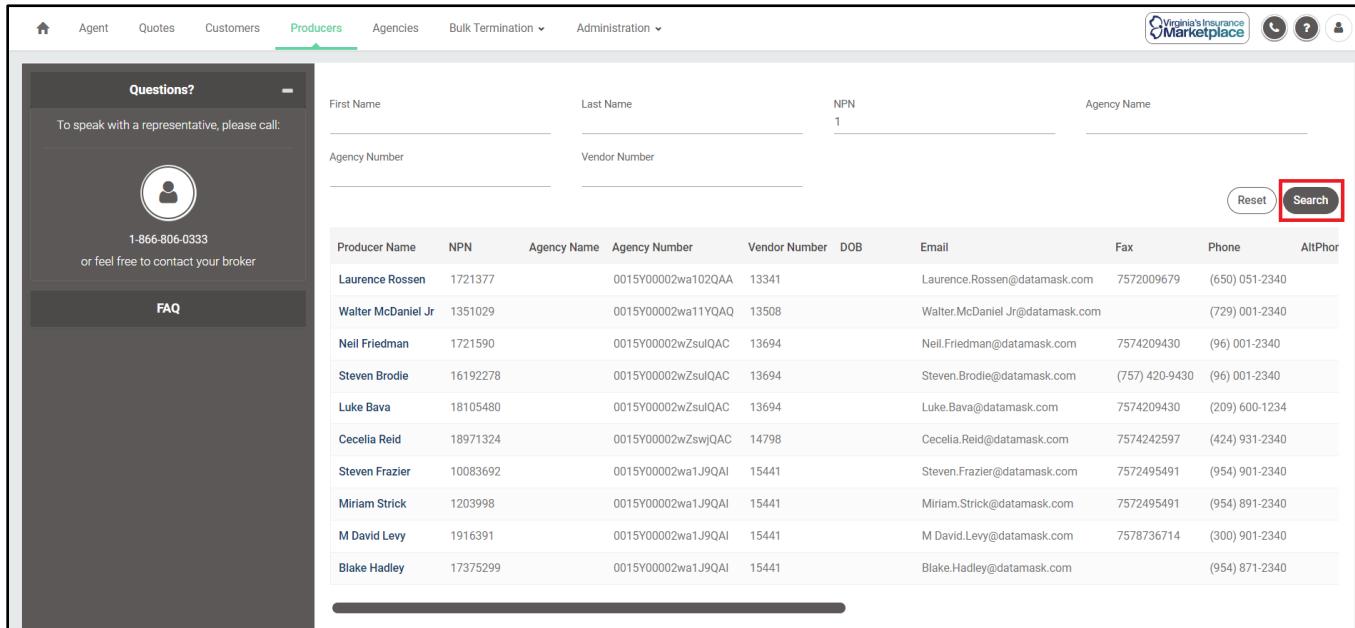
Document Type	Document Name	Upload Date	Uploaded By
Renewal Notification Letter	RenewalLetter_1-6848447208_20507VA141001706-20507VA141005106_S952501427	10/6/2018	Siebel System

8 Producers Tab

8.1 Producer Listing

The producer tab lists all the producers available in the system, including both Active and Terminated. When you navigate to this screen, by default you will see the search section. Enter the required search criteria and click the **Search** button. The system will display the matching producers as shown in the below screenshot.

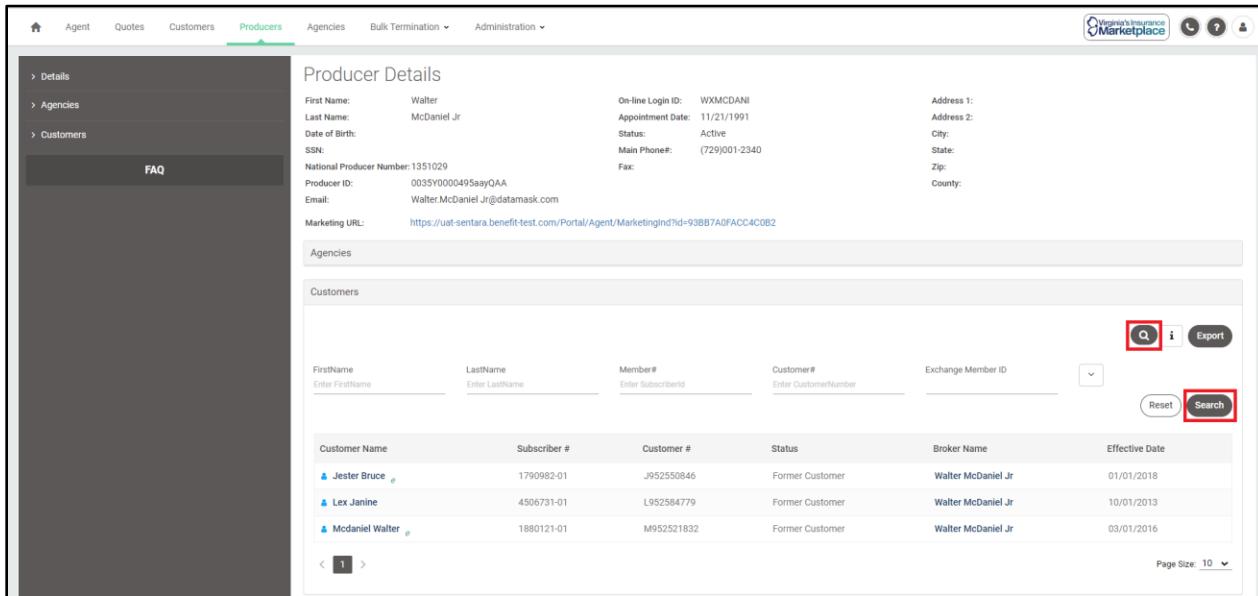
To view the details of the producer, click on the producer name hyperlink. You will be navigated to the producer detail screen.



Producer Name	NPN	Agency Name	Agency Number	Vendor Number	DOB	Email	Fax	Phone	AltPhone
Laurence Rossen	1721377		0015Y00002wa102QAA	13341		Laurence.Rossen@datamask.com	7572009679	(650) 051-2340	
Walter McDaniel Jr	1351029		0015Y00002wa11YQAA	13508		Walter.McDaniel Jr@datamask.com		(729) 001-2340	
Neil Friedman	1721590		0015Y00002wZsulQAC	13694		Neil.Friedman@datamask.com	7574209430	(96) 001-2340	
Steven Brodie	16192278		0015Y00002wZsulQAC	13694		Steven.Brodie@datamask.com	(757) 420-9430	(96) 001-2340	
Luke Bava	18105480		0015Y00002wZsulQAC	13694		Luke.Bava@datamask.com	7574209430	(209) 600-1234	
Cecelia Reid	18971324		0015Y00002wZswjQAC	14798		Cecelia.Reid@datamask.com	7574242597	(424) 931-2340	
Steven Frazier	10083692		0015Y00002wa1J9QAI	15441		Steven.Frazier@datamask.com	7572495491	(954) 901-2340	
Miriam Strick	1203998		0015Y00002wa1J9QAI	15441		Miriam.Strick@datamask.com	7572495491	(954) 891-2340	
M David Levy	1916391		0015Y00002wa1J9QAI	15441		M David.Levy@datamask.com	7578736714	(300) 901-2340	
Blake Hadley	17375299		0015Y00002wa1J9QAI	15441		Blake.Hadley@datamask.com		(954) 871-2340	

8.2 Producer Details

The details of the producer and their customers are displayed here. The system has provision to perform search on the customers to bring up the required customers. Click the **Search** icon to input the search criteria and then click on the **Search** button to initiate the search for a specific customer associated to the producer.



The screenshot shows the 'Producer Details' page. At the top, there are tabs for Agent, Quotes, Customers, **Producers** (which is selected), Agencies, Bulk Termination, and Administration. The main content area is titled 'Producer Details' and displays the following producer information:

First Name:	Walter	On-line Login ID:	WXMCDANI	Address 1:	
Last Name:	McDaniel Jr	Appointment Date:	11/21/1991	Address 2:	
Date of Birth:		Status:	Active	City:	
SSN:		Main Phone#:	(729)001-2340	State:	
National Producer Number:	1351029	Fax:		Zip:	
Producer ID:	0035Y0000495ayQAA			County:	
Email:	Walter.McDaniel.Jr@datamask.com				
Marketing URL:	https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=93BB7A0FACC4C0B2				

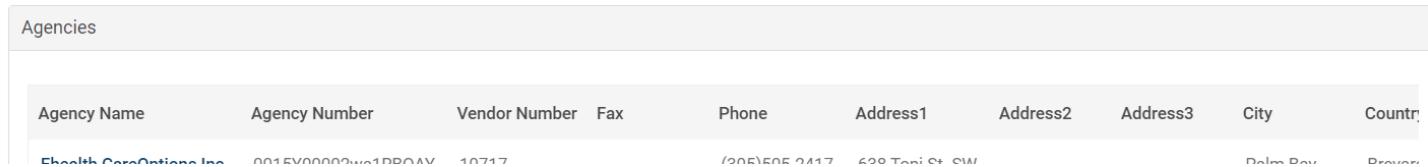
Below this, there are sections for 'Agencies' and 'Customers'. The 'Customers' section contains search fields for FirstName, LastName, Member#, Customer#, and Exchange Member ID, along with buttons for 'Reset' and 'Search'. A table lists customers with the following data:

Customer Name	Subscriber #	Customer #	Status	Broker Name	Effective Date
Jester Bruce	1790982-01	J952550846	Former Customer	Walter McDaniel Jr	01/01/2018
Lex Janine	4506731-01	L952584779	Former Customer	Walter McDaniel Jr	10/01/2013
McDaniel Walter	1880121-01	M952521832	Former Customer	Walter McDaniel Jr	03/01/2016

At the bottom right, there is a 'Page Size: 10' dropdown and a navigation bar with '1' and '>' buttons.

Click on the **Customer Name** hyperlink to view the complete details of the selected customers. When you click on the **Customer Name** hyperlink in the above screen, you will be navigated to the **Customer/Individual Details** screen detailed out in the [Section 7](#) in this document.

You can view the agency to which this producer is associated by clicking on the Agencies accordion in the producer screen.



The screenshot shows the 'Agencies' accordion expanded. It displays a table with the following columns: Agency Name, Agency Number, Vendor Number, Fax, Phone, Address1, Address2, Address3, City, and Country. The data for the single row is as follows:

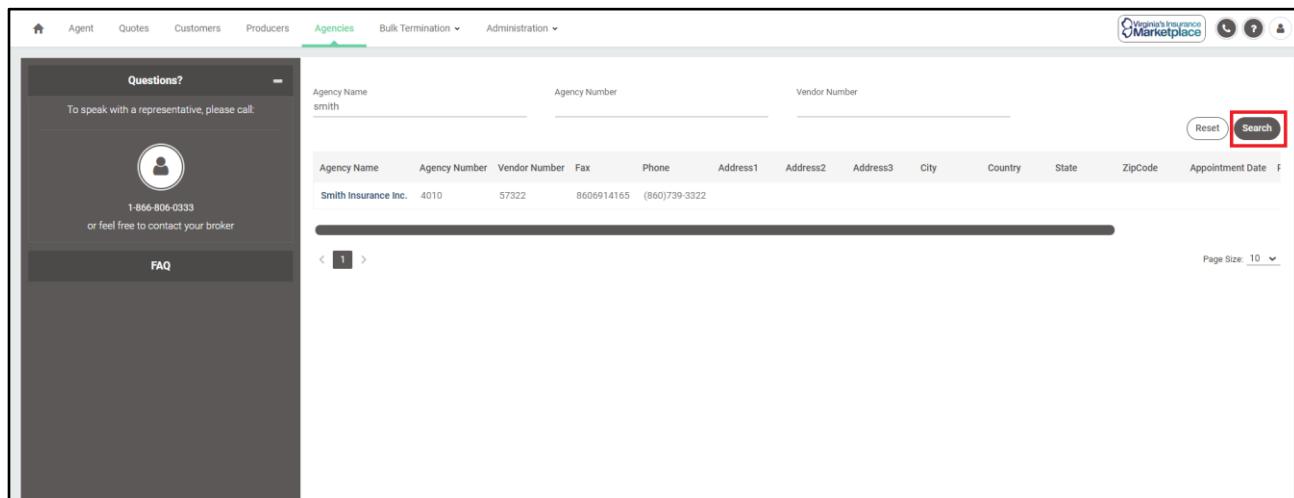
Agency Name	Agency Number	Vendor Number	Fax	Phone	Address1	Address2	Address3	City	Country
HealthCorporations Inc	0015V00000001D0AV	10717		12051505 0117	620 Tami Ct	SW		Dalem	Day

9 Agency Tab

9.1 Agency Listing

The agency tab lists all the agencies available in the system. When you navigate to this screen, by default you will see the search section. Enter the required search criteria and click the Search button. The system will display the matching agencies as shown in the below screenshot.

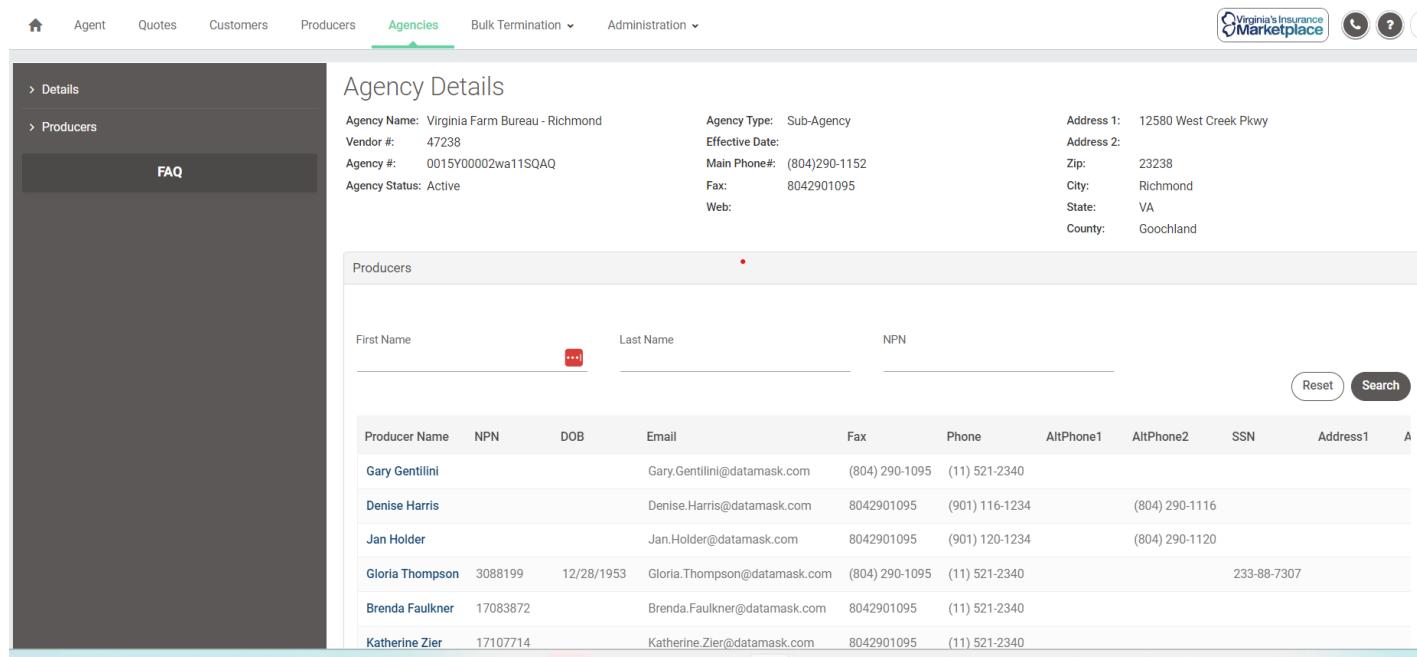
To view the details of the agency, click on the agency name hyperlink. You will be navigated to the agency detail screen.



The screenshot shows the 'Agencies' tab selected in the top navigation bar. A search bar at the top contains the text 'smith'. Below the search bar, a table displays agency information. The first row in the table is for 'Smith Insurance Inc.' with agency number 4010, vendor number 57322, and phone number (860)739-3322. The table has columns for Agency Name, Agency Number, Vendor Number, Fax, Phone, Address1, Address2, Address3, City, Country, State, ZipCode, and Appointment Date. A 'Search' button is highlighted with a red box in the top right corner of the search bar area. The sidebar on the left includes sections for 'Questions?', 'FAQ', and 'Producers'.

9.2 Agency Details

The details of the agency and their producers are displayed here. The system has provision to perform search on the producers to bring up the required producer(s). Click the Search icon to input the search criteria and then click on the Search button to initiate the search for a specific producer associated to the agency.



The screenshot shows the 'Agencies' tab selected in the top navigation bar. On the left, a sidebar has 'Details' and 'Producers' sections. The main area is titled 'Agency Details' and shows agency information: Name: Virginia Farm Bureau - Richmond, Vendor #: 47238, Agency #: 0015Y00002wa11SQAQ, and Status: Active. To the right, there are fields for 'Agency Type', 'Effective Date', 'Main Phone#', 'Fax', 'Web', and address details: Address 1: 12580 West Creek Pkwy, Address 2: 23238, Zip: 23238, City: Richmond, State: VA, and County: Goochland. Below this is a 'Producers' table with columns: Producer Name, NPN, DOB, Email, Fax, Phone, AltPhone1, AltPhone2, SSN, and Address1. The table lists several producers: Gary Gentilini, Denise Harris, Jan Holder, Gloria Thompson, Brenda Faulkner, and Katherine Zier. Each producer has a corresponding email address and phone number listed.

10 Customer Termination & Reinstatement

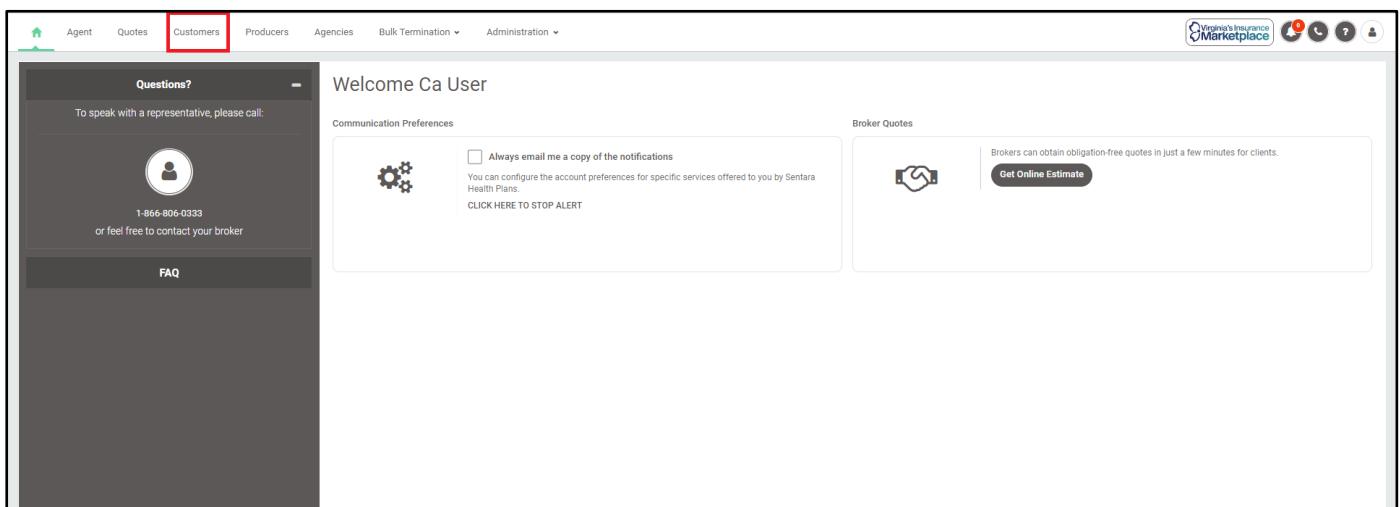
10.1 Termination

Access: Customer Terminations can be done by Sentara users only.

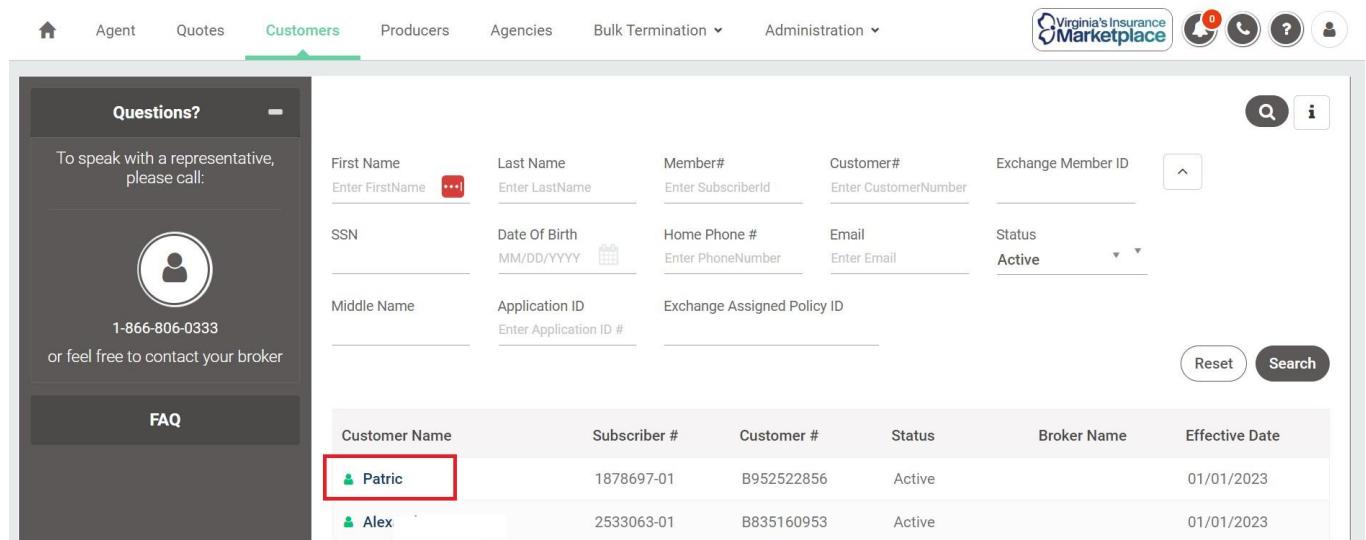
Customer termination can be performed on an Off-exchange, FFM and SBE (State based exchange) customers, but the user will have to choose the appropriate reason that are applicable. For example, for SBE customers, issuer can perform and send only non-pay cancellation and termination. So, the user will have to choose the appropriate termination reason.

Sentara users can terminate a customer by searching for the customer in the customer screen. Then drilldown on the customer name to navigate to the customer detail screen. Follow below steps to initiate the termination process.

On the Sentara Health Plans Portal home page click on **Customers** tab.

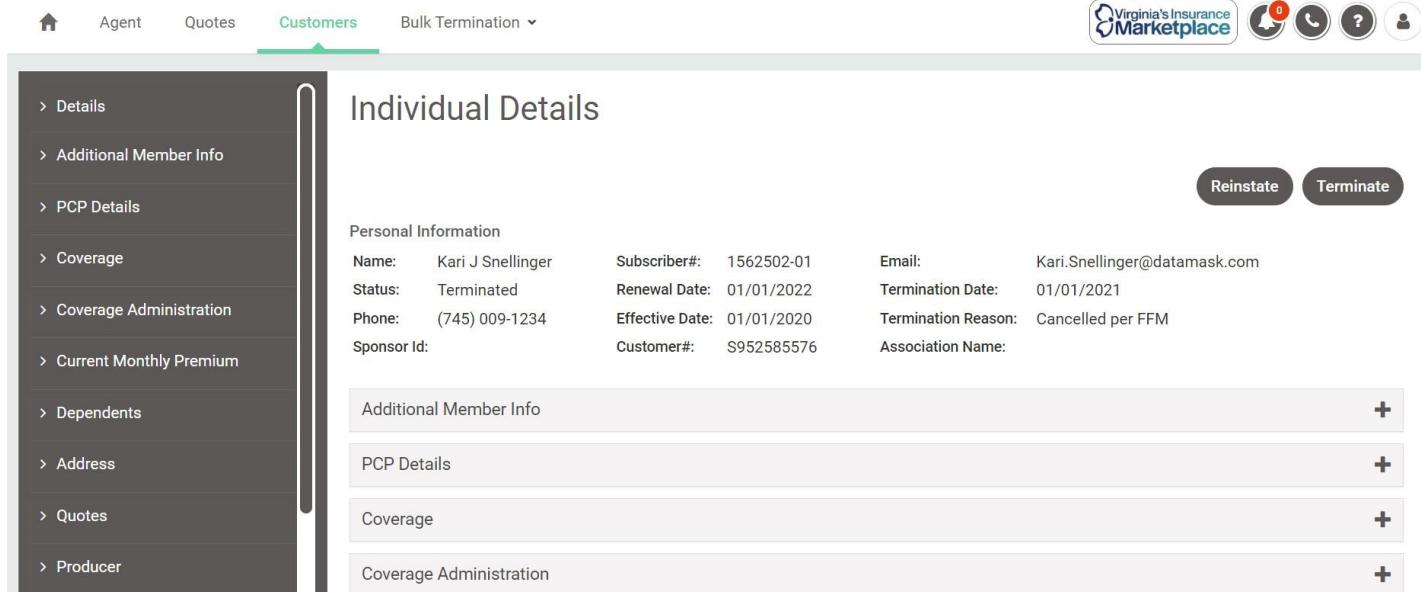


The application displays the customer screen. Perform a search to bring up the expected customer by using various search criteria displayed in the below screenshot. Click on the **Customer Name** (for example, Patric as shown in the below screenshot) to navigate to the Customer/Individual Detail screen.



The portal will display the 'Terminate' button in the customer detail screen. The 'Terminate' button can be used to terminate an active customer or update the termination date of an already terminated customer.

To initiate the termination process, click on the 'Terminate' button.



The screenshot shows the 'Individual Details' page for a customer named Kari J Snellinger. The top navigation bar includes links for Home, Agent, Quotes, Customers (which is the active tab), and Bulk Termination. The right side of the header features the Virginia's Insurance Marketplace logo and several icons for messaging, notifications, and user profile.

Individual Details

Personal Information

Name:	Kari J Snellinger	Subscriber#:	1562502-01	Email:	Kari.Snellinger@datamask.com
Status:	Terminated	Renewal Date:	01/01/2022	Termination Date:	01/01/2021
Phone:	(745) 009-1234	Effective Date:	01/01/2020	Termination Reason:	Cancelled per FFM
Sponsor Id:		Customer#:	S952585576	Association Name:	

Additional Member Info

PCP Details

Coverage

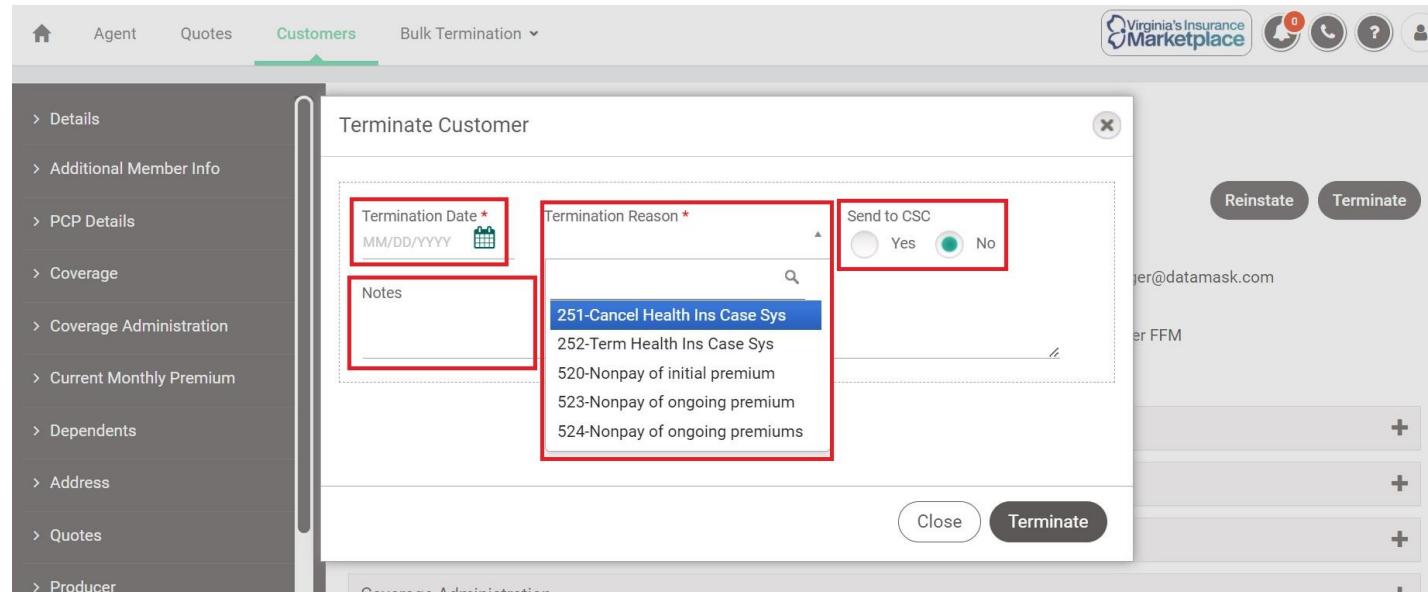
Coverage Administration

Reinstate **Terminate**

Navigation Sidebar:

- > Details
- > Additional Member Info
- > PCP Details
- > Coverage
- > Coverage Administration
- > Current Monthly Premium
- > Dependents
- > Address
- > Quotes
- > Producer

The system will display a popup as shown in the below screenshot. Provide the Termination Date, Termination Reason, select Send to CSC as Yes or No to indicate whether the termination transaction needs to be transmitted to CSC or not. Also, enter the notes with any additional information about the termination. Click on Terminate button.



The system will perform termination for the selected customers. Notes provided in the above popup will be visible in the 'Notes' accordion detailed out in section 7.16.

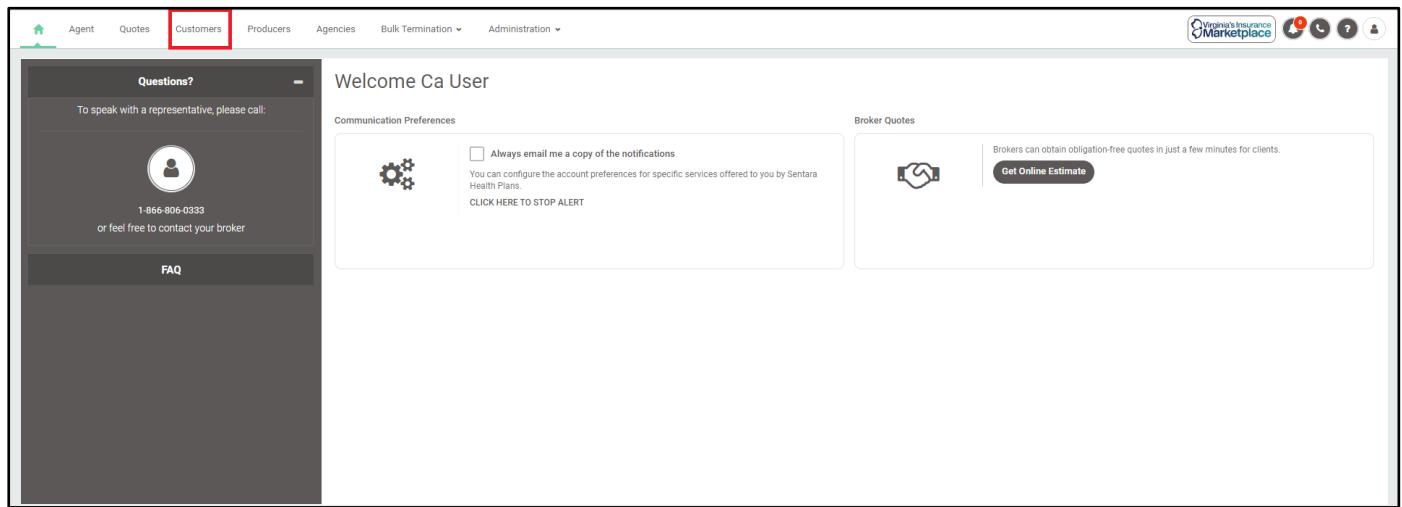
10.2 Reinstatement

Access: Customer Reinstatement can be done by Sentara users only.

Customer Reinstatement can be performed on Off-exchange and FFM customers only. Reinstatement is not applicable for State Based Exchange customers. User will have to choose the appropriate reason that are applicable at the time of running the reinstatement flow.

Sentara users can reinstate a customer by searching for the customer in the customer screen and then drilldown on the customer name to navigate to the customer detail screen. Follow below steps to initiate the reinstatement process.

On the Sentara Health Plans Portal home page click on **Customers** tab.



The application displays the customer screen. Perform a search to bring up the expected customer by using various search criteria displayed in the below screenshot. Click on the **Customer Name** (for example, Patric as shown in the below screenshot) to navigate to the Customer/Individual Detail screen.

Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Customer Name	Subscriber #	Customer #	Status	Broker Name	Effective Date
Patric	1878697-01	B952522856	Active		01/01/2023
Alex	2533063-01	B835160953	Active		01/01/2023

Reset **Search**

The portal will display the 'Reinstate' button in the customer detail screen. The 'Reinstate' button can be used to reinstate the terminated customer.

To initiate the reinstatement process, click on the 'Reinstate' button.

Individual Details

Personal Information

Name: Kari J Snellinger	Subscriber#: 1562502-01	Email: Kari.Snellinger@datamask.com
Status: Terminated	Renewal Date: 01/01/2022	Termination Date: 01/01/2021
Phone: (745) 009-1234	Effective Date: 01/01/2020	Termination Reason: Cancelled per FFM
Sponsor Id:	Customer#: S952585576	Association Name:

Reinstate **Terminate**

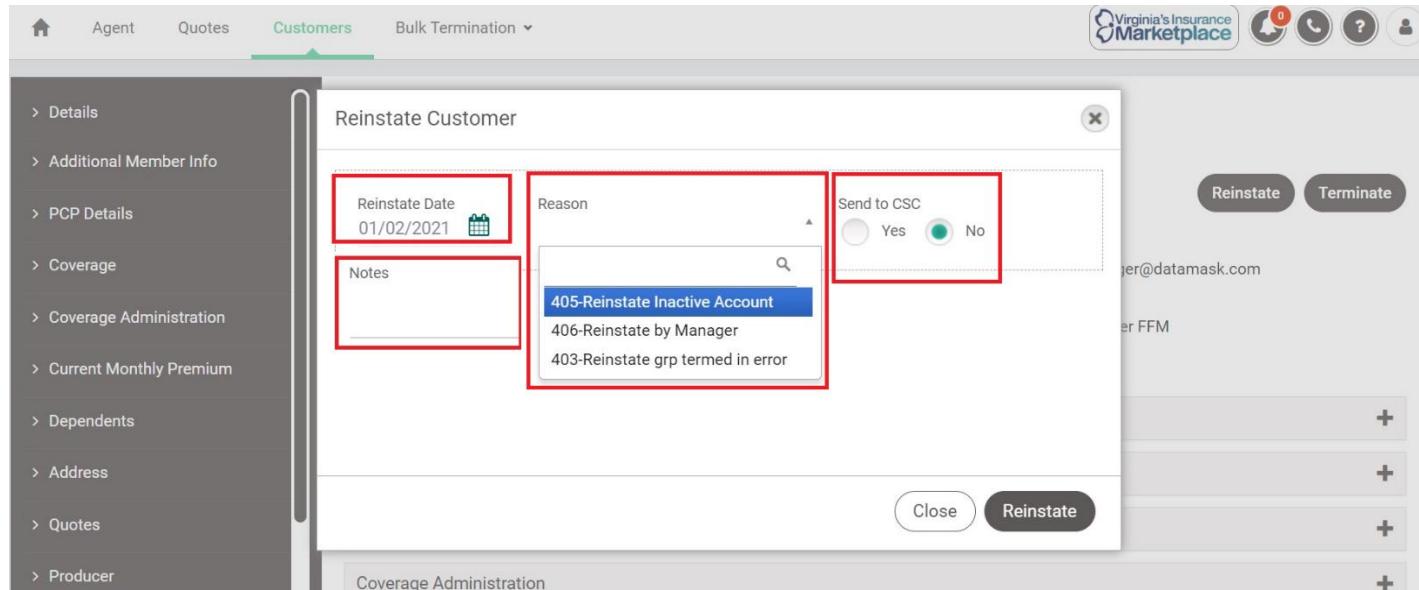
Additional Member Info

PCP Details

Coverage

Coverage Administration

The system will display a popup as shown in the below screenshot. The system will auto populate reinstate date with a date of termination date plus one, for example, if the termination date is 8/31/2023, then the reinstatement date will be auto populated as 9/1/2023. You will have to select the reinstatement reason and select Send to CSC as Yes or No to indicate whether the reinstatement transaction needs to be transmitted to CSC or not. Also, enter the notes with any additional information about the reinstatement. Click on the Reinstate button.



The system will perform the reinstatement for the selected customers. Notes provided in the above popup will be visible in the 'Notes' accordion detailed out in section 7.16.

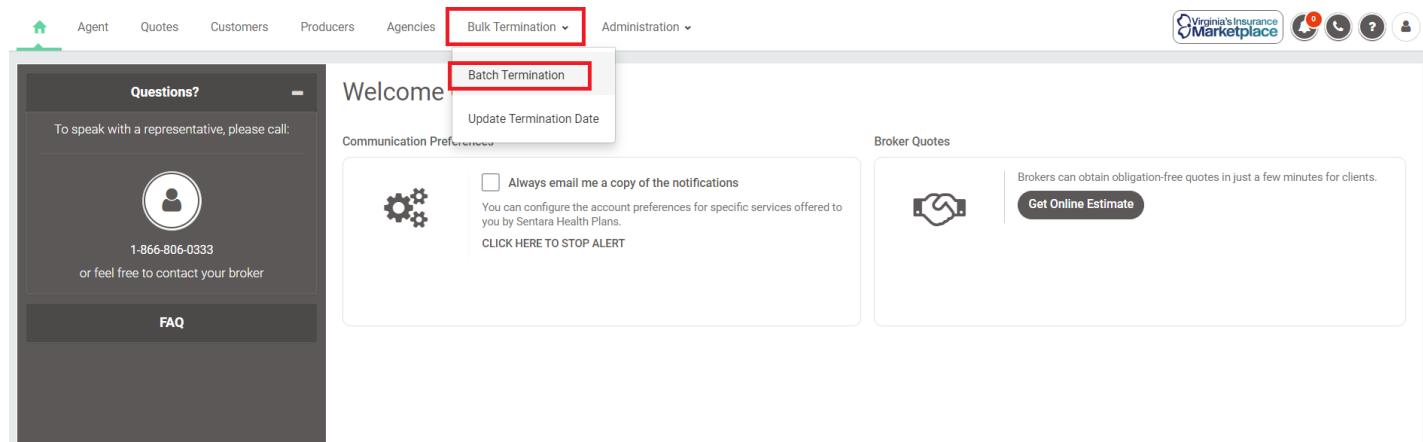
11 Bulk Termination

11.1 Batch Termination

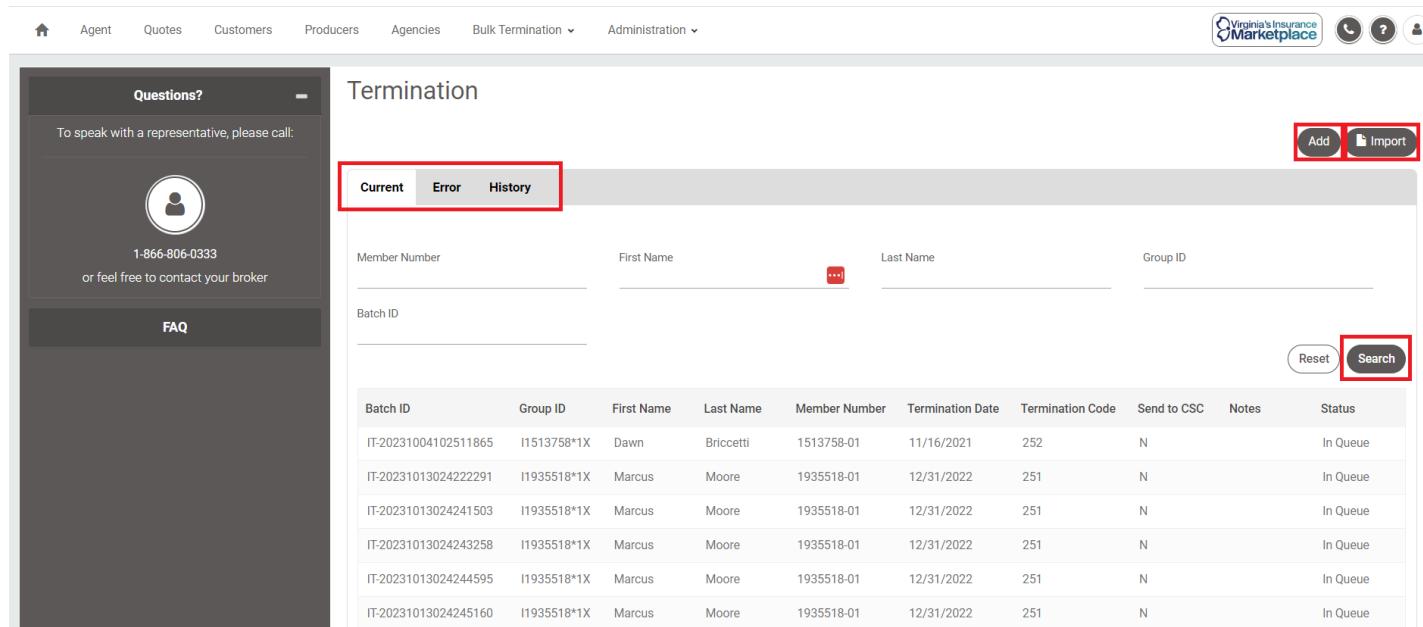
This functionality is available only for those who play the Carrier Administrator role within Sentara users list.

This process can be used to terminate customers in bulk by uploading a csv file or by adding each customer manually by clicking **Add** button.

Batch termination process can be invoked from the Bulk Termination top level menu as shown in the below screenshot. Click on the **Batch Termination** menu item.



You will be navigated to the below Batch Termination Screen.



Batch ID	Group ID	First Name	Last Name	Member Number	Termination Date	Termination Code	Send to CSC	Notes	Status
IT-20231004102511865	I1513758*1X	Dawn	Briccetti	1513758-01	11/16/2021	252	N		In Queue
IT-20231013024222291	I1935518*1X	Marcus	Moore	1935518-01	12/31/2022	251	N		In Queue
IT-20231013024241503	I1935518*1X	Marcus	Moore	1935518-01	12/31/2022	251	N		In Queue
IT-20231013024243258	I1935518*1X	Marcus	Moore	1935518-01	12/31/2022	251	N		In Queue
IT-20231013024244595	I1935518*1X	Marcus	Moore	1935518-01	12/31/2022	251	N		In Queue
IT-20231013024245160	I1935518*1X	Marcus	Moore	1935518-01	12/31/2022	251	N		In Queue

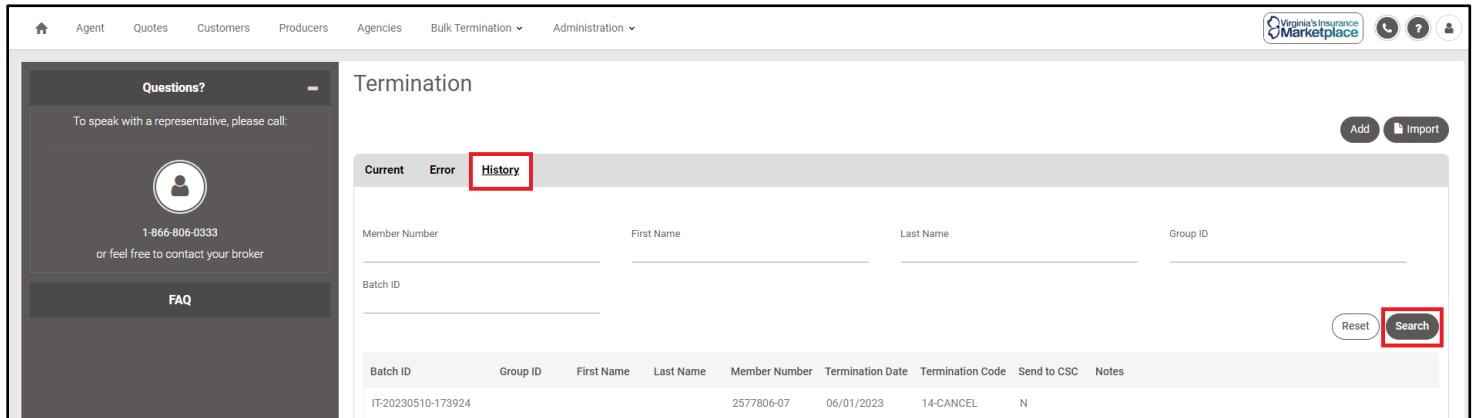
Click on **Current** tab to view all records currently being processed for termination.

Click on **Error** tab to view all error records that need edits and fixes.

By clicking on the **Search** button, you can search for records in the current, error and history tabs.

Click on the **History** tab to view all the previous records that have been terminated or cancelled.

There is a search functionality to find past terminated and cancelled records. See records with the following characteristics:

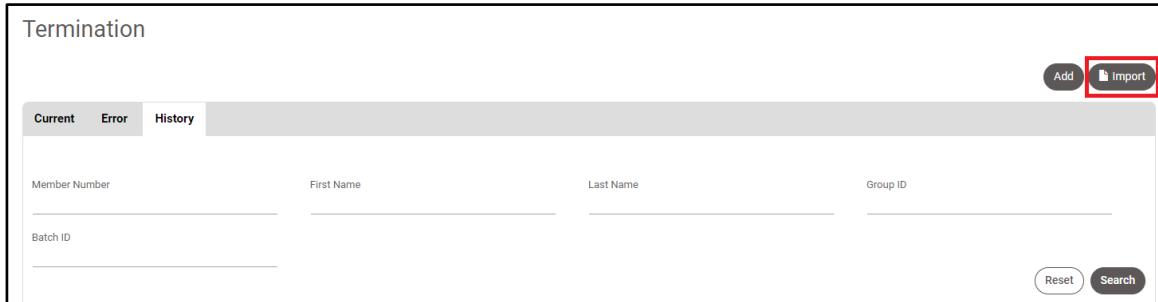


The screenshot shows the 'Termination' search interface. On the left, there is a sidebar with 'Questions?' and 'FAQ' sections, and a contact phone number '1-866-806-0333'. The main search area has tabs for 'Current', 'Error', and 'History', with 'History' selected and highlighted with a red box. Below the tabs are search fields for 'Member Number', 'First Name', 'Last Name', and 'Group ID', and a 'Batch ID' field. To the right are 'Add' and 'Import' buttons. At the bottom is a table with columns: Batch ID, Group ID, First Name, Last Name, Member Number, Termination Date, Termination Code, Send to CSC, and Notes. A single row is shown: IT-20230510-173924, 2577806-07, 06/01/2023, 14-CANCEL, N. There are 'Reset' and 'Search' buttons at the bottom right, with 'Search' also highlighted with a red box.

Batch ID	Group ID	First Name	Last Name	Member Number	Termination Date	Termination Code	Send to CSC	Notes
IT-20230510-173924	2577806-07				06/01/2023	14-CANCEL	N	

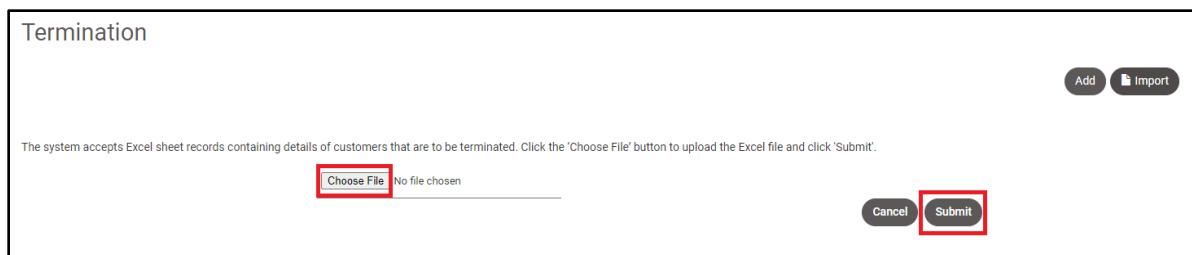
Import button:

Click the **Import** button to terminate a set of customers from a file. The file must be in .csv format. To initiate the file import process, click on the **Import** button.



The screenshot shows the 'Termination' page. At the top right, there are three buttons: 'Add', 'Import' (which is highlighted with a red box), and 'Search'. Below these are three tabs: 'Current' (selected), 'Error', and 'History'. The main area contains four input fields: 'Member Number', 'First Name', 'Last Name', and 'Group ID', each with a corresponding text input box. Below these is a 'Batch ID' section with a text input box. At the bottom right are 'Reset' and 'Search' buttons.

The system will display below popup. Click **Choose File** button to upload the csv file that contains the list of customers to be terminated. After uploading the file, click the **Submit** button to initiate the Batch Termination process.



The screenshot shows a modal dialog box titled 'Termination'. It contains a message: 'The system accepts Excel sheet records containing details of customers that are to be terminated. Click the 'Choose File' button to upload the Excel file and click 'Submit''. Below this is a 'Choose File' button (highlighted with a red box) and a text input field showing 'No file chosen'. At the bottom are 'Cancel' and 'Submit' buttons (the 'Submit' button is highlighted with a red box).

Add button:

Click on the **Add** button to terminate a single customer.



The screenshot shows the 'Termination' page again. At the top right, the 'Add' button is highlighted with a red box. The rest of the interface is identical to the previous screenshot, including the tabs, input fields, and bottom buttons.

When you click on Add button, below screen will be displayed. Enter the details of the customer as prompted in the below popup to be deleted and click on the **Terminate** button.

Terminate Customer

Termination Date * 

Termination Reason *

Send to CSC Yes No

Member ID *

First Name *

Last Name *

Group ID *

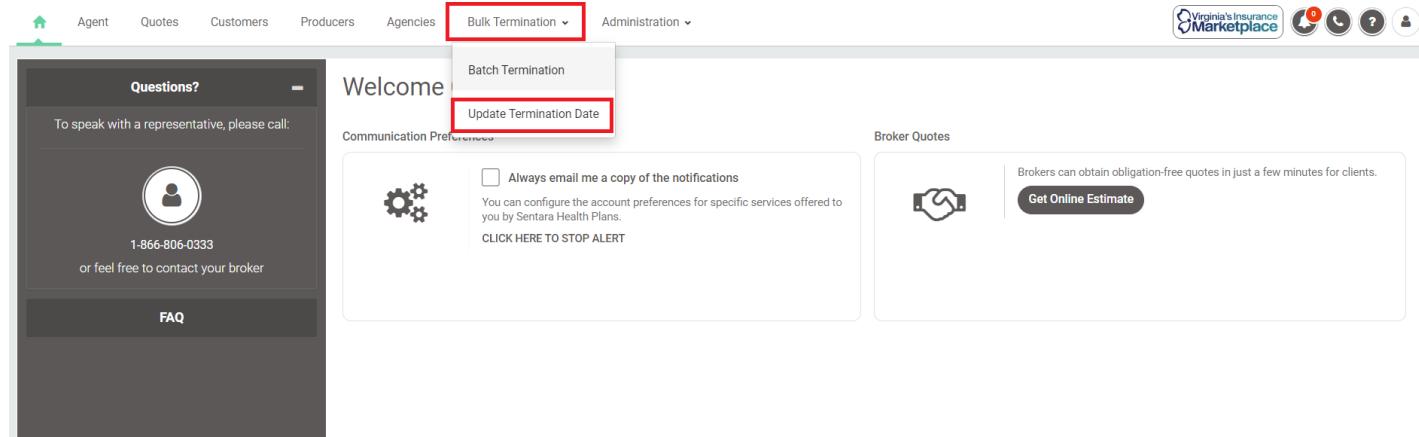
Notes

11.2 Update Termination Date

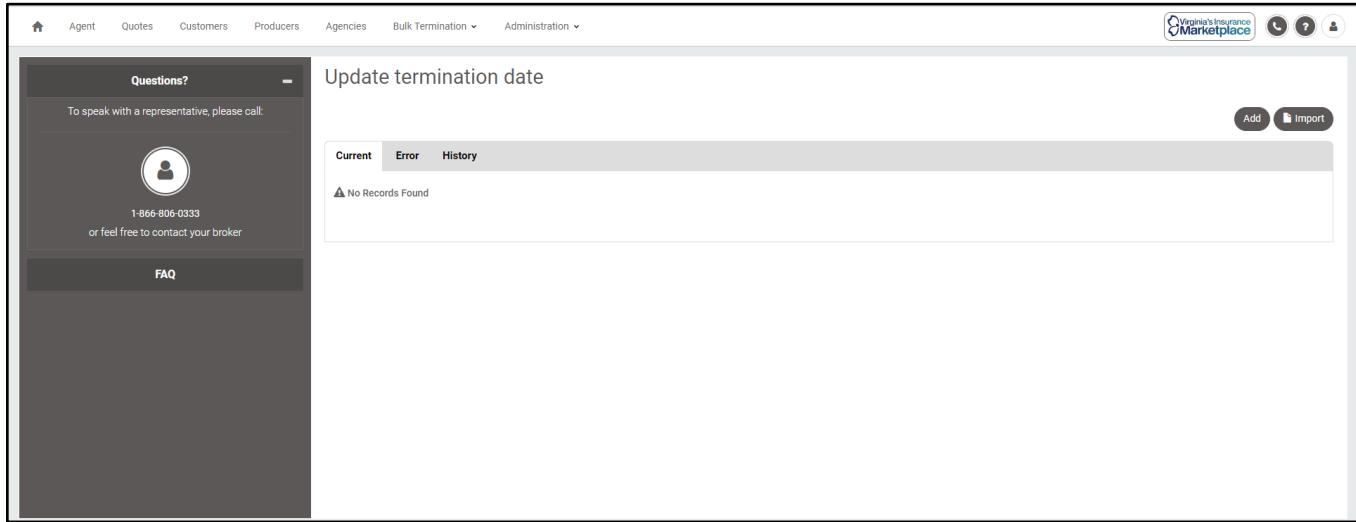
This functionality is available only for those who play the Carrier Administrator role within Sentara users list.

This process can be used to update the term date to a lesser termination date in bulk by uploading a csv file or by adding each customer manually by clicking **Add** button.

Batch Update Termination Date process can be invoked from the **Bulk Termination** top level menu as shown in the below screenshot and then clicking on the **Update Termination Date** menu item.



You will be navigated to the below screen.



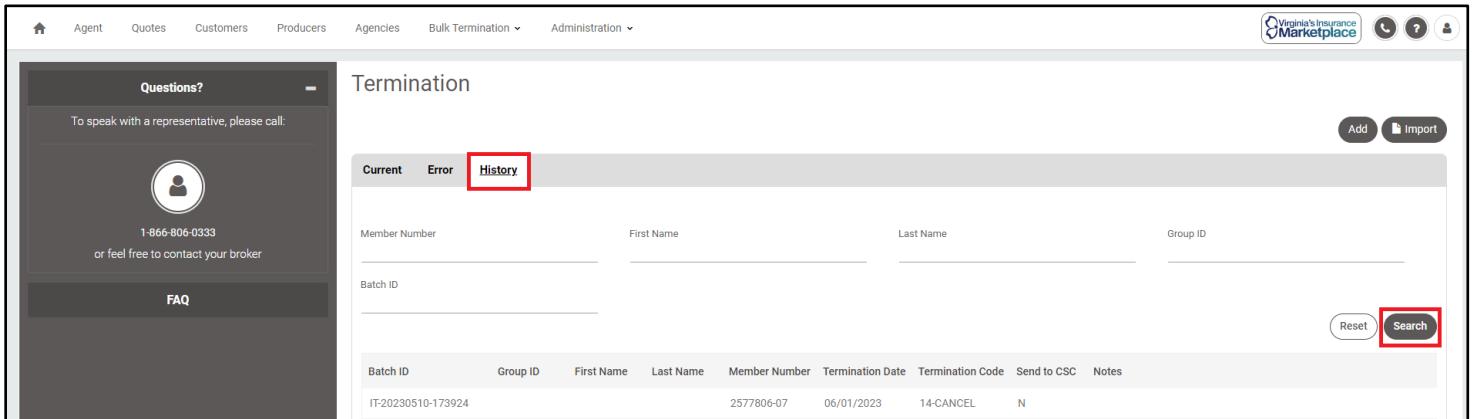
Click on **Current** tab to view all records currently being processed.

Click on **Error** tab to view all error records that need edits and fixes.

By clicking on the **Search** button, you can search for records in the current, error and history tabs.

Click on the **History** tab to view all the previous records that have been submitted to update the termination date.

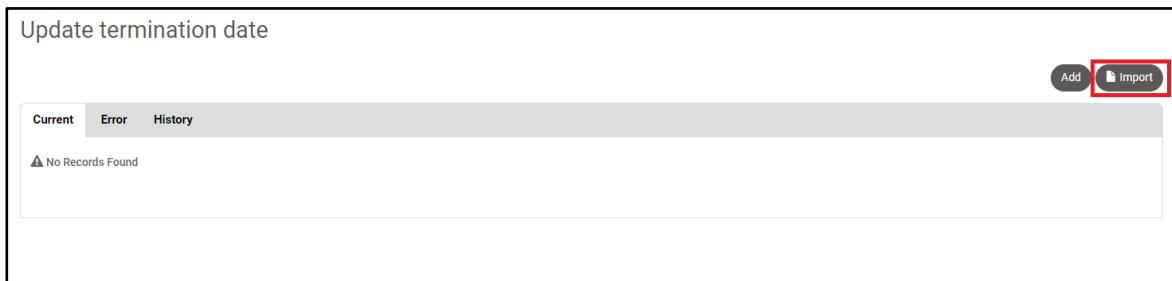
There is a search functionality to find past submitted records. See records with the following characteristics:



The screenshot shows the 'Termination' page with the 'History' tab selected. The page includes search fields for Member Number, First Name, Last Name, and Group ID, and a table of historical data with columns: Batch ID, Group ID, First Name, Last Name, Member Number, Termination Date, Termination Code, Send to CSC, and Notes. The 'Search' button is highlighted with a red box.

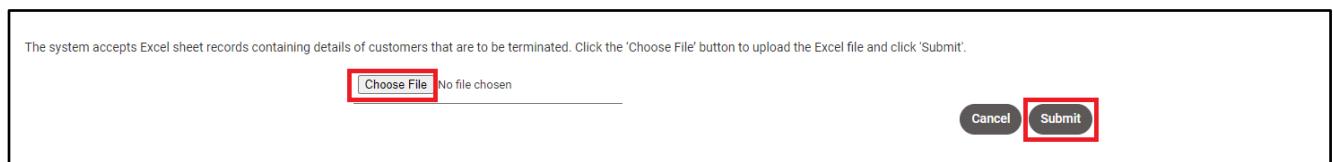
Import button:

Click the **Import** button to update the termination date for a set of customers from a file. The file must be in .csv format. To initiate the file import process, click on the Import button.



The screenshot shows the 'Update termination date' page with the 'Import' button highlighted with a red box.

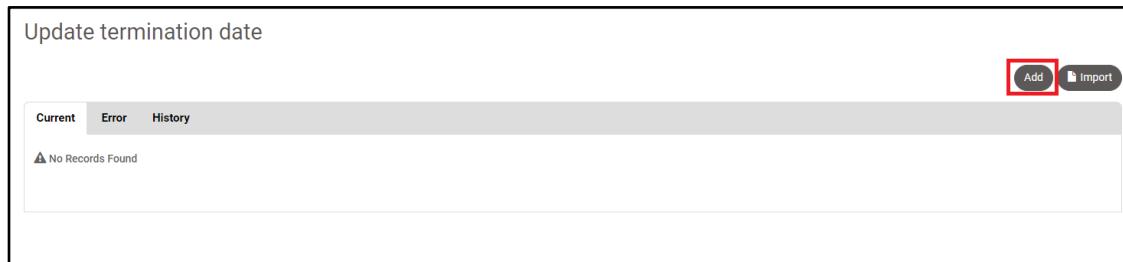
The system will display below popup. Click **Choose File** button to upload the csv file that contains the list of customers to be terminated with a lower termination date. After uploading the file, click the **Submit** button to initiate the Batch Termination process.



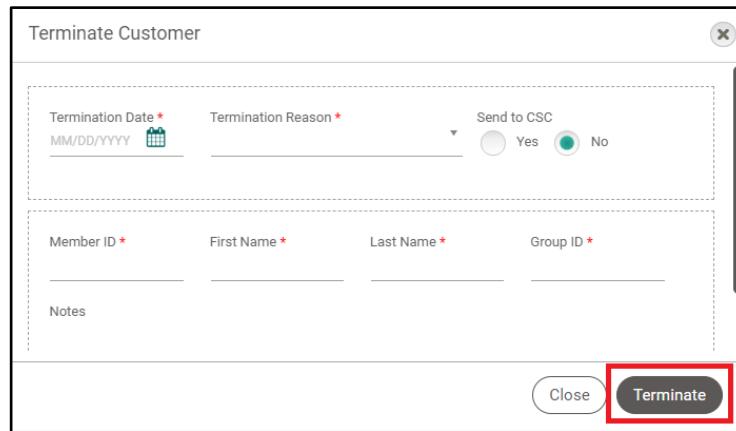
The screenshot shows a file upload dialog box with the 'Choose File' button highlighted with a red box and the 'Submit' button highlighted with a red box.

Add button:

Click on the **Add** button to update the termination date for a single customer



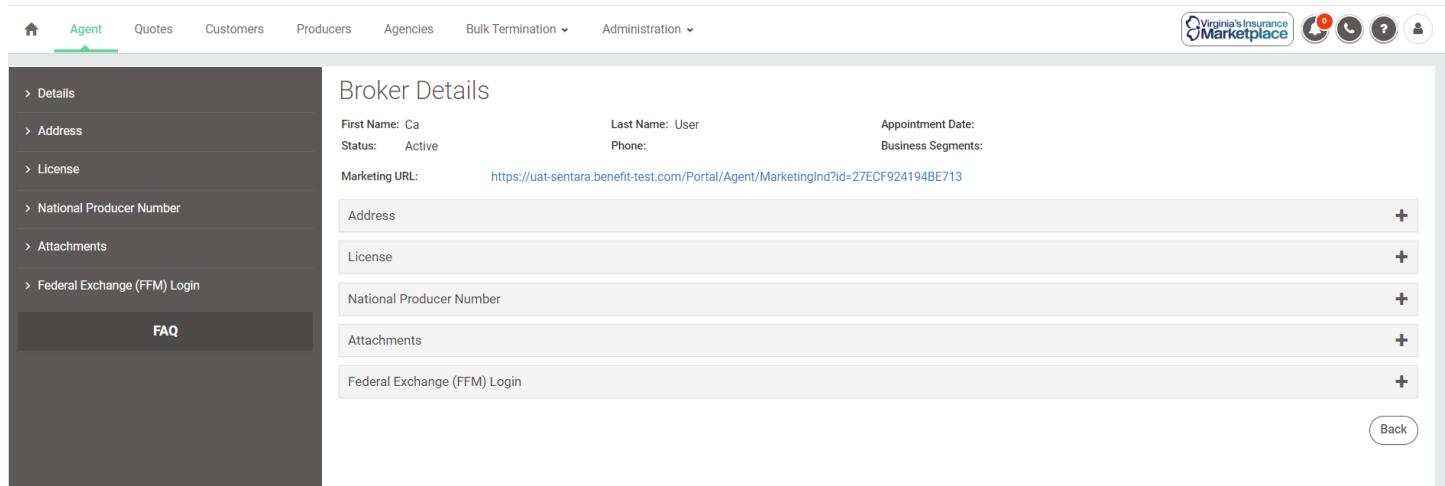
When you click on Add button, below screen will be displayed. Enter the details of the customer as prompted in the below popup to be deleted and click on the Terminate button.



12 Agent Details

12.1 Broker Details Screen

As a broker when you login to the Sentara portal using SSO, you will see the below screen where you will have to provide some key information.



Broker Details

First Name: Ca Last Name: User Appointment Date:
Status: Active Phone: Business Segments:
Marketing URL: <https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=27ECF924194BE713>

Address

License

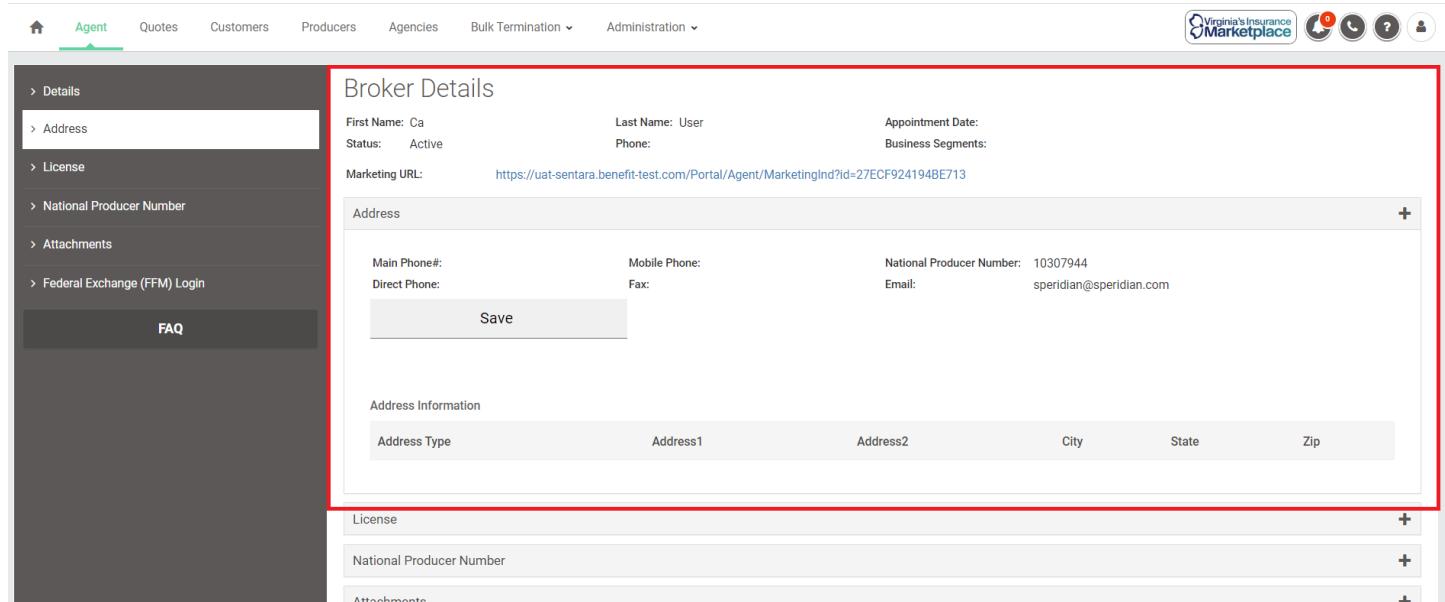
National Producer Number

Attachments

Federal Exchange (FFM) Login

12.2 Address Details

You can view your address details in the below screen.



Broker Details

First Name: Ca Last Name: User Appointment Date:
Status: Active Phone: Business Segments:
Marketing URL: <https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=27ECF924194BE713>

Address

Main Phone#: Mobile Phone: National Producer Number: 10307944
Direct Phone: Fax: Email: speridian@speridian.com

Save

Address Information

Address Type	Address1	Address2	City	State	Zip

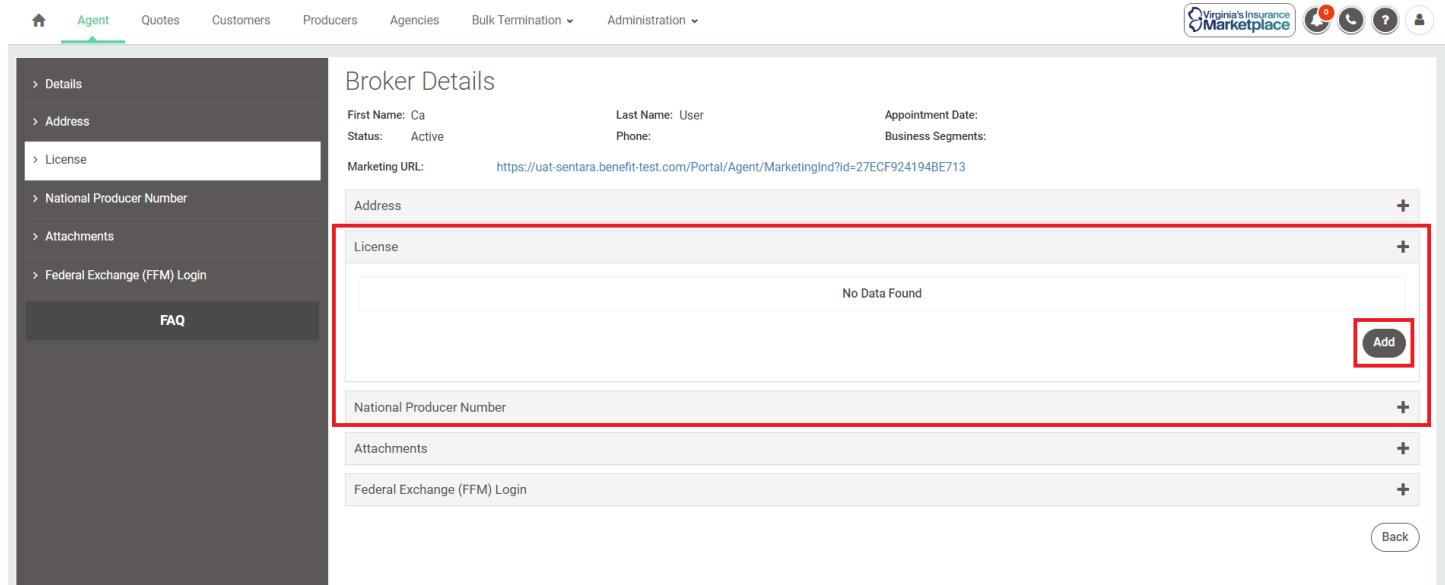
License

National Producer Number

Attachments

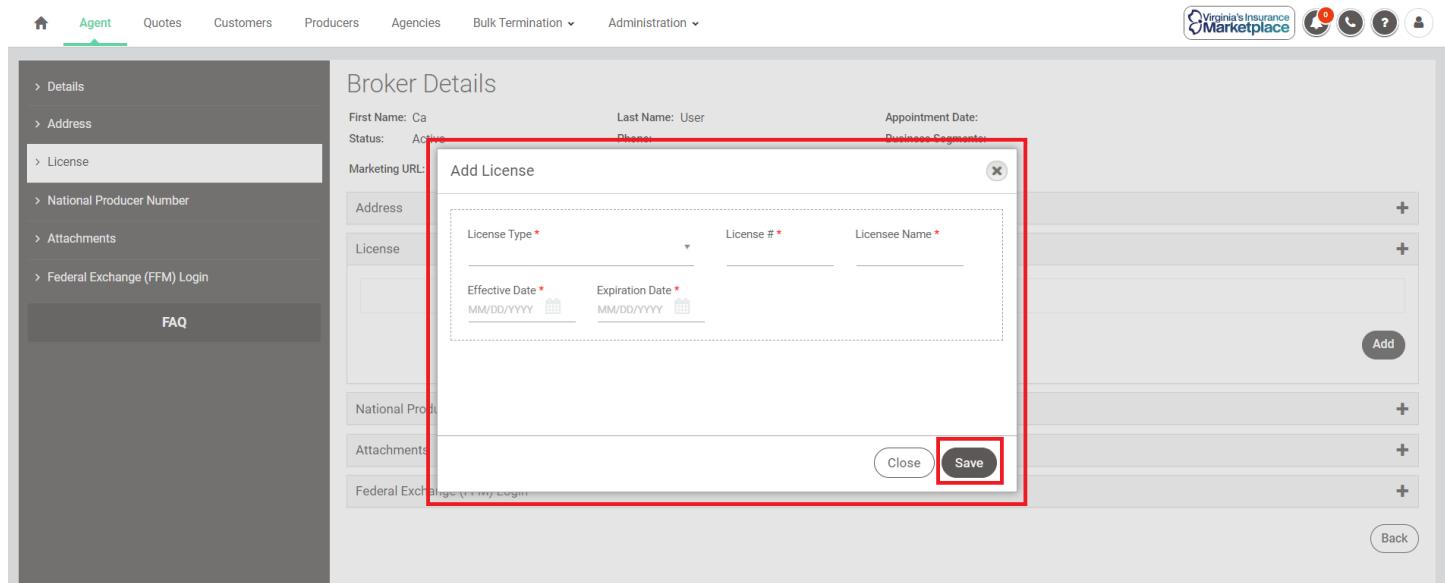
12.3 License Details

You can view your license details in the below screen. To Add your license details newly, click on the Add button.



The screenshot shows the 'Broker Details' page. On the left, a sidebar lists 'Details', 'Address', 'License' (which is selected and highlighted with a red box), 'National Producer Number', 'Attachments', and 'Federal Exchange (FFM) Login'. The main content area shows basic user information: First Name: Ca, Status: Active, Last Name: User, Phone: (redacted), Appointment Date: (redacted), and Business Segments: (redacted). Below this is a 'Marketing URL' field with the value <https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=27ECF924194BE713>. The 'License' section contains a table with columns for 'Address' and 'License'. A red box highlights the 'License' column. The table shows 'No Data Found'. An 'Add' button is located in the bottom right corner of this section, also highlighted with a red box. Other sections like 'National Producer Number', 'Attachments', and 'Federal Exchange (FFM) Login' are shown below.

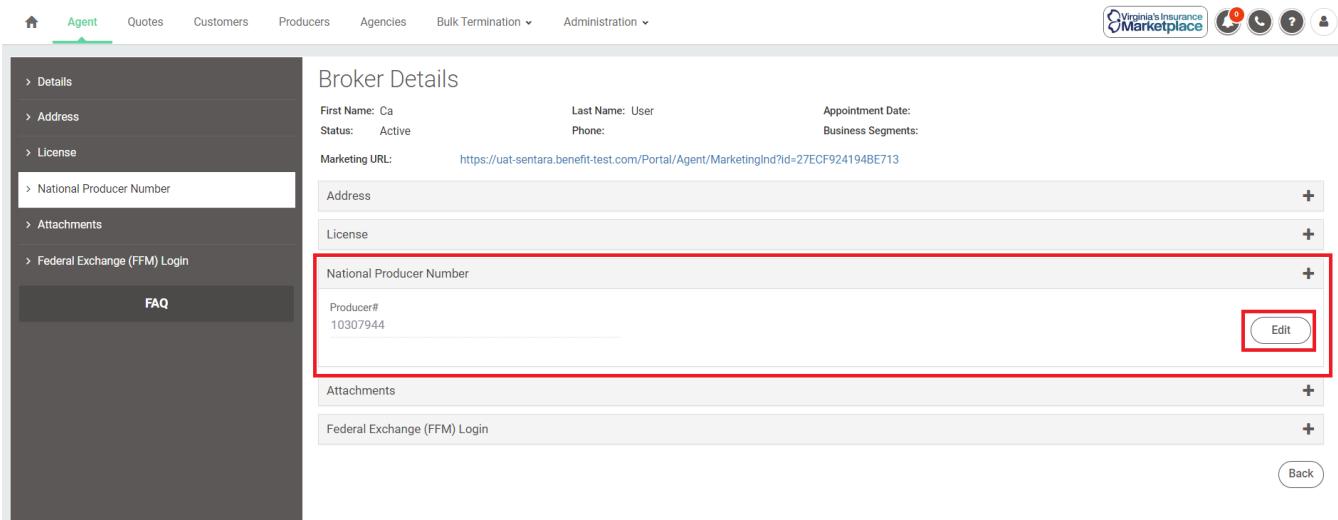
The system will display the below popup. Update the license information and click the **Save** button.



The screenshot shows a 'Broker Details' page with a sidebar and a main content area. The 'License' tab is selected in the sidebar. A 'Marketing URL' field contains the value <https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=27ECF924194BE713>. The main content area includes sections for 'Address', 'License' (with a table showing 'No Data Found'), 'National Producer Number', 'Attachments', and 'Federal Exchange (FFM) Login'. A 'Back' button is in the bottom right. A red box highlights the 'Add License' button in the 'License' section. A modal window titled 'Add License' is open, containing fields for 'License Type' (dropdown), 'License #', 'Licensee Name', 'Effective Date' (MM/DD/YYYY), and 'Expiration Date' (MM/DD/YYYY). The 'Save' button in the bottom right of the modal is also highlighted with a red box.

12.4 National Producer Number (NPN) Details

You can view your National Producer Number (NPN) details in the below screen. If you want to add new NPN or edit an existing NPN, click on the **Edit** button shown in the below screenshot.



Broker Details

First Name: Ca Last Name: User Appointment Date:

Status: Active Phone: Business Segments:

Marketing URL: <https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=27ECF924194BE713>

National Producer Number

Producer#
10307944

Address

License

Attachments

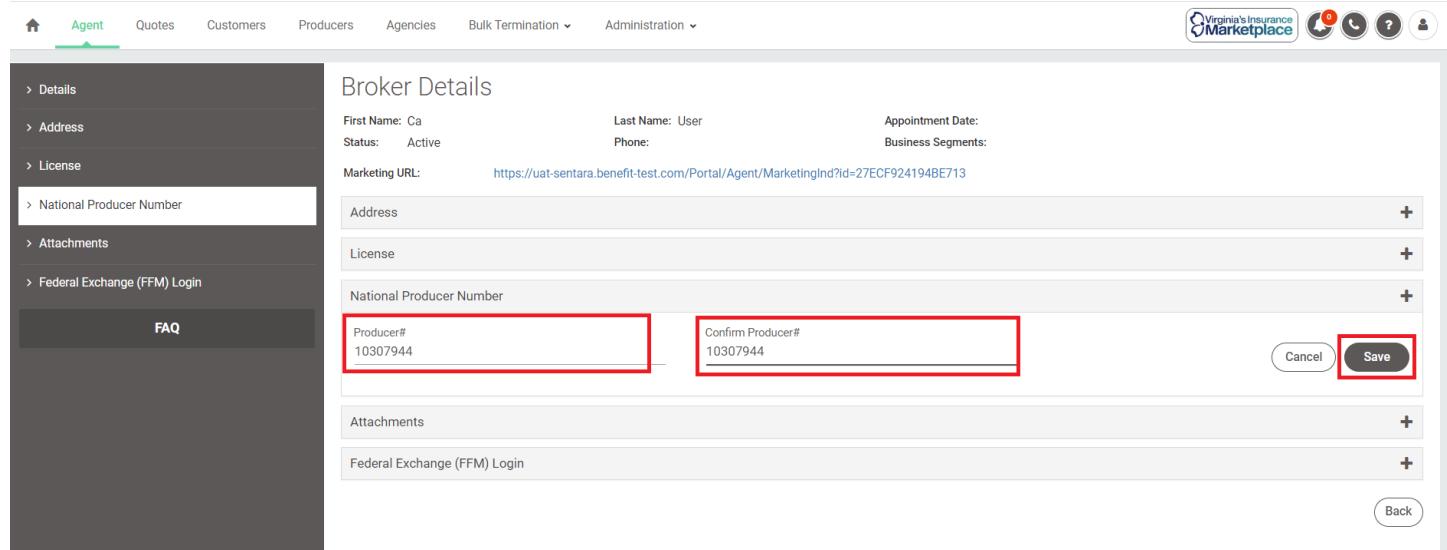
Federal Exchange (FFM) Login

FAQ

Edit

Back

Provide the Producer# (NPN) and then again confirm the re-entering the producer# (NPN) and then click on the Save button.



Broker Details

First Name: Ca Last Name: User Appointment Date:

Status: Active Phone: Business Segments:

Marketing URL: <https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=27ECF924194BE713>

National Producer Number

Producer#
10307944

Confirm Producer#
10307944

Address

License

Attachments

Federal Exchange (FFM) Login

FAQ

Cancel

Save

Back

12.5 FFM Login Details

You can view your FFM Login details in the below screen. To add new FFM Login details or edit an existing FFM login details, click on the **Edit** button as shown in the below screenshot.

Agent Quotes Customers Producers Agencies Bulk Termination Administration

Virginia's Insurance Marketplace    

Broker Details

First Name: Ca Last Name: User Appointment Date:
Status: Active Phone: Business Segments:
Marketing URL: <https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=27ECF924194BE713>

Address 
License 
National Producer Number 
Attachments 

Federal Exchange (FFM) Login

FFM User Name 
DATA1EXPO1261

Back

Provide the FFM Login ID and then again confirm by re-entering the FFM Login ID and then click on the Save button.

Agent Quotes Customers Producers Agencies Bulk Termination Administration

Virginia's Insurance Marketplace    

Broker Details

First Name: Ca Last Name: User Appointment Date:
Status: Active Phone: Business Segments:
Marketing URL: <https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=27ECF924194BE713>

Address 
License 
National Producer Number 
Attachments 

Federal Exchange (FFM) Login

FFM User Name 
DATA1EXPO1261

Confirm FFM User Name 
DATA1EXPO1261

Back

13 Glossary

CMS Center for Medicare and Medicaid Innovation

EDE Enhanced Direct Enrollment

FFM Federally Facilitated Marketplace

SBC Summary of Benefits Coverage

SBE State Based Exchange

NPN Nurse Practitioner Number

CSC Clinical Support Coordinator

PCP Primary Care Provider