



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
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8	09/25/2023	1.7	Added Managing Off-Exchange
9	09/30/2023	1.8	Edits regarding Off-Exchange screenshots
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12	10/04/2023	2.1	Version shared with users
13	10/05/2023	2.2	Updated to Sentara Logo
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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.

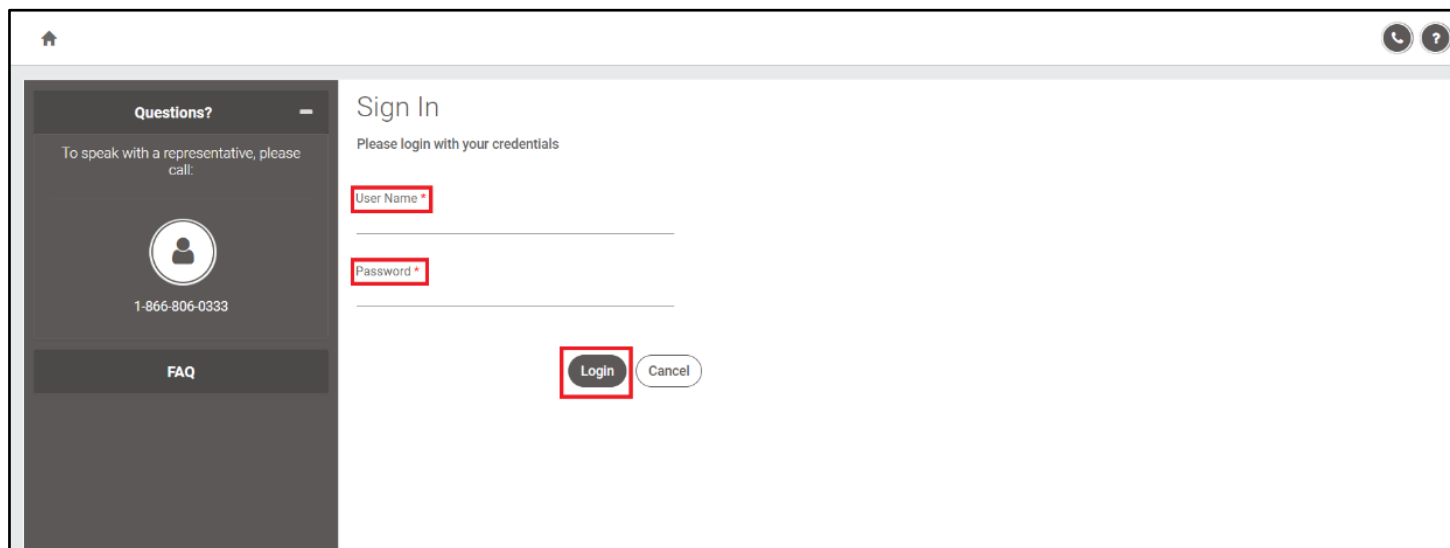
The Off-Exchange enrollment process allows consumers and brokers to apply for and enroll in individual health insurance coverage on the Portal. Enrollment on the Portal is for QHP Off-Exchange and Non-QHP plans only.

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 displays the login interface of the Sentara Health Plans Portal. On the left, a dark sidebar contains a 'Questions?' section with a user icon and the phone number 1-866-806-0333, and an 'FAQ' button below it. The main content area is titled 'Sign In' and prompts the user to 'Please login with your credentials'. It features two input fields: 'User Name *' and 'Password *', both highlighted with red rectangular boxes. Below these fields are two buttons: a dark 'Login' button and a light 'Cancel' button, with the 'Login' button also highlighted by a red rectangular box. The top of the page includes a home icon on the left and a phone/question mark icon on the right.

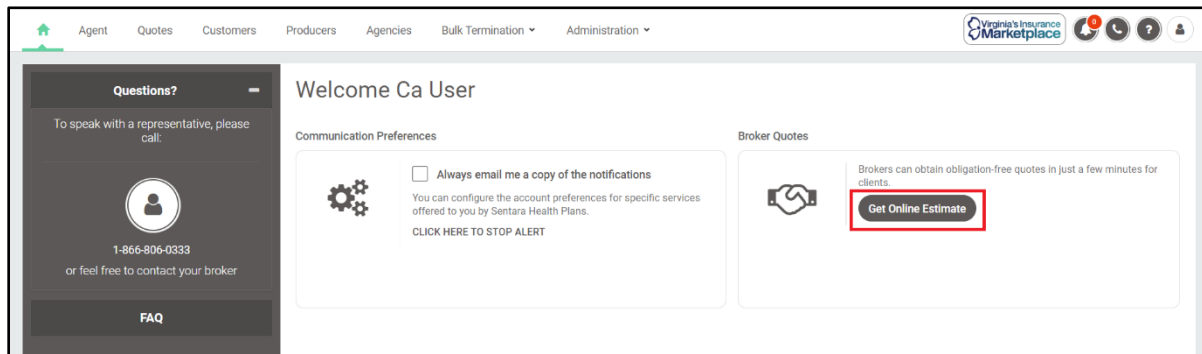
3 Quoting and Enrollment (On-Exchange)

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.

Finding An Affordable Health Insurance Plan is Simple !!

Access a plethora of health plans to find health coverage that meets your customer's needs and budget

BasicsHealthQuote

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

+ Spouse

+ Dependent

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

FPL Chart

Cancel

See Plans

7

Sentara Health Plans Portal User Guide

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.

Who needs coverage?

Applicant

Gender *

Choose Your Option

Date of Birth *

MM/DD/YYYY

Tobacco User *

No

+ Spouse

+ Dependent

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.

Who needs coverage?

Applicant

Gender *

Choose Your Option

Date of Birth *

MM/DD/YYYY

Tobacco User *

No

Dependent

Gender *

Choose Your Option

Date of Birth *

MM/DD/YYYY

Tobacco User *

No

- Remove

+ Spouse

+ Dependent

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?' form. The 'Applicant' section is active, with fields for Gender (Choose Your Option), Date of Birth (MM/DD/YYYY), and Tobacco User (No). A red box highlights the '+ Spouse' button. Below the form, a blue banner contains the text: '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?' form with the 'Spouse' section active. It includes fields for Gender (Choose Your Option), Date of Birth (MM/DD/YYYY), and Tobacco User (No). A red box highlights the '- Remove' button. Below the form, a blue banner contains the text: '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.'

3.4 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.

Who needs coverage?

Applicant: Male, Date of Birth: 10/05/1992, Tobacco User: No

Buttons: + Spouse, + Dependent

Tip: 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: \$40,000

Buttons: Cancel, See Plans

The application displays plan details as shown below.

Sentara Health Plans

9 out of 20 Health Plans

Filter By: Plan ID, Metal Level, Premium, Deductible, Providers, Drug(s), Plan Category

Sort By: Plan ID, Metal Level, Premium, Deductible, Providers, Drug(s), Plan Category

Basics | Health | Quote

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

Your estimated FPL% is 274.35%

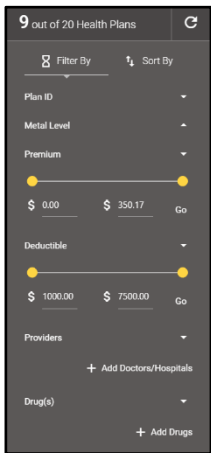
Plans are sorted by premium.

Plan ID	Plan Name	Deductible	Max Out-of-Pocket	Coinsurance	Monthly Premium
20507VA1410019	Sentara Direct M Bronze 7200 Ded	\$7,200 Individual / \$14,400 Family	\$9,450 Individual / \$18,900 Family	40% Coinsurance	\$260.37
20507VA1410070	Sentara Standard M Bronze 7500 Ded	\$7,500 Individual / \$15,000 Family	\$9,400 Individual / \$18,800 Family	50% Coinsurance	\$274.35
20507VA1410008	Sentara Direct M Bronze 6000 Ded HSA	\$6,000 Individual / \$12,000 Family	\$7,500 Individual / \$15,000 Family	30% Coinsurance	\$283.33

3.5 Sort and Filter Plans

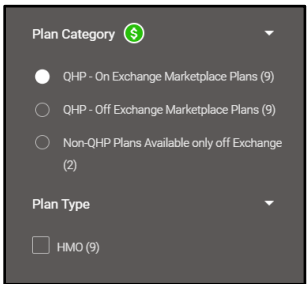
You can filter plans by using **Filter By** or **Sort By** options in the left pane of the plans page.

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



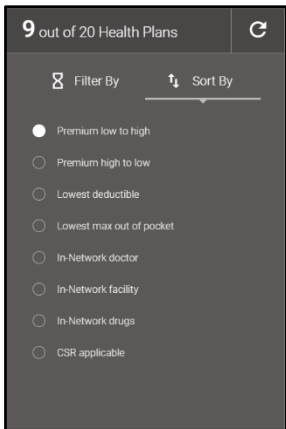
User can select different types of filtering as per the requirement.

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



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

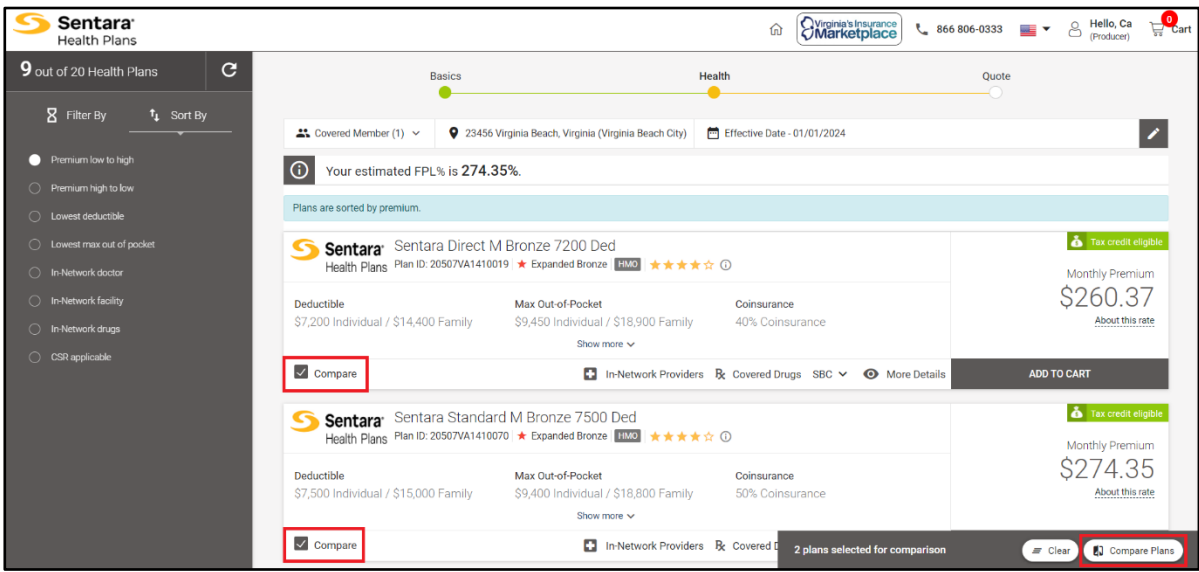
Click **Sort By** to sort the plans as per the requirement.



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.





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	Monthly Premium \$82.10
		Original Rate \$274.35	Monthly Premium \$96.08
Key Benefits			
Deductible	In Network Tier 1: \$7,200 Individual / \$14,400 Family	In Network: \$7,500 Individual / \$15,000 Family	
Max Out-of-Pocket	In Network Tier 1: \$9,450 Individual / \$18,900 Family	In Network: \$9,400 Individual / \$18,800 Family	
Coinsurance	In Network Tier 1: 40% Coinsurance In Network Tier 2: 50% 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		Monthly Premium \$82.10		Original Rate \$274.35	
						Monthly Premium \$96.08	
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.

Sentara
Health Plans

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

Deductible
\$7,200 Individual / \$14,400 Family

Max Out-of-Pocket
\$9,450 Individual / \$18,900 Family

Coinurance
40% Coinurance

[Show more](#) ▾

Monthly Premium
\$260.37
About this rate

[Tax credit eligible](#)

☒ Compare

[+ In-Network Providers](#)

[⌕ Covered Drugs](#)

[SBC ▾](#)

[👁 More Details](#)

[ADD TO CART](#)

Sentara
Health Plans

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

[View](#)

[Email](#)

Monthly Premium
\$267.10

[Tax credit eligible](#)

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

<p>Summary of Benefits and Coverage: What this Plan Covers & What You Pay for Covered Services</p> <p>Sentara Direct M Bronze 7200 Ded</p> <p>Sentara Health Plans</p>			<p>Coverage Period: Beginning on or after 01/01/2024</p> <p>Coverage Code for: Individual/Family Plan Type: HMO</p>
<p>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 includes 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 www.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.</p>			
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-care-benefits/ .	
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). Contact 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.

Email SBC

Specify your email address *


Type your comments here

Close

Send

3.8 View Plan Details

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



Sentara Direct M Bronze 7200 Ded
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

In-Network Providers

Covered Drugs

SBC


More Details

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 Direct M Bronze 7200 Ded
★ Expanded Bronze | HMO

Original Rate :
\$260.37

Monthly Premium
\$82.10



Plan Benefit Details




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.






 Send

Plan Benefit Details

Key Benefits



Sentara Direct M Bronze 7200 Ded
Expanded Bronze | HMO

Original Rate :

\$260.37

Monthly Premium

\$82.10

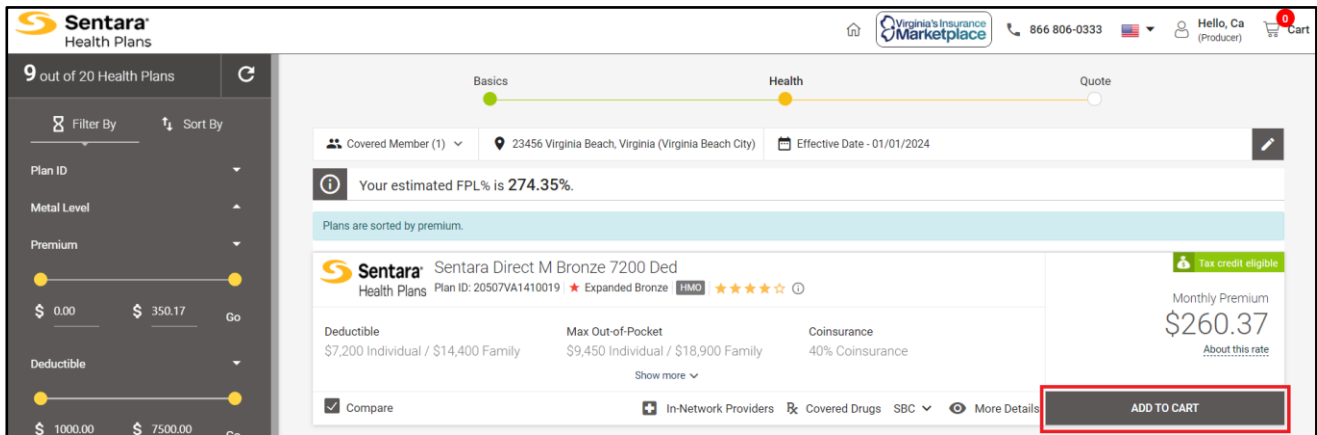
Click the **Download** icon to download the Plan Benefit Details.

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

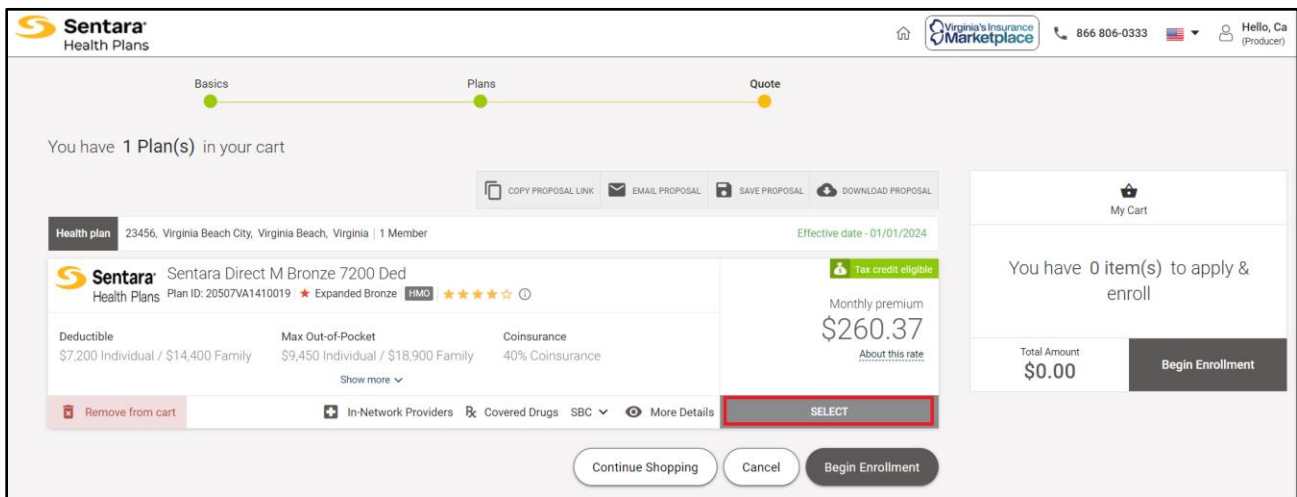
Click the **Close** icon to go back to the plans listing page.

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.



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



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 screenshot shows the Sentara Health Plans portal. At the top, there's a navigation bar with the Sentara logo, a home icon, the Virginia's Insurance Marketplace logo, a phone number (866 806-0333), a flag icon, and a user profile (Hello, Ca (Producer)). Below the navigation bar, there's a progress bar with three steps: Basics, Plans, and Quote. The 'Plans' step is currently active. The main content area shows a message: 'You have 1 Plan(s) in your cart'. Below this, there are buttons for 'COPY PROPOSAL LINK', 'EMAIL PROPOSAL', 'SAVE PROPOSAL', and 'DOWNLOAD PROPOSAL'. The plan details for 'Sentara Direct M Bronze 7200 Ded' are displayed, including the deductible, max out-of-pocket, coinsurance, and monthly premium (\$260.37). A green 'SELECTED' button is visible. At the bottom, there are three buttons: 'Continue Shopping', 'Cancel', and 'Begin Enrollment', with the 'Begin Enrollment' button highlighted by a red box.

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.

The screenshot shows a 'Enter Contact Details of Customer' popup form. It has two columns of input fields. The first column contains 'First Name' (John), 'Gender' (Male), and 'Email Address' (jsmith@gmail.com). The second column contains 'Last Name' (Smith), 'Date of Birth' (10/05/1992), and 'Phone' ((913) 483-4702). At the bottom right, there are two buttons: 'Close' and 'Save', with the 'Save' button highlighted by a red box. Below the buttons, there is a small disclaimer text: '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.'

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

The screenshot shows an informational popup message. The text inside the popup reads: 'You will now be redirected to a page from where you can navigate to Virginia's Insurance Marketplace website to complete the application. You have the ability to copy the data from that page to the relevant sections on Virginia's Insurance Marketplace website.' At the bottom right, there are two buttons: 'Cancel' and 'Proceed', with the 'Proceed' button highlighted by a red box.

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.

Virginia's Insurance Marketplace

866 806-0333

Hello, Ca (Producer)

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

Save

SDP reference for State Exchange

Virginia's Insurance Marketplace

866 806-0333

Hello, Ca (Producer)

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	Virginia Beach City	Virginia Beach	Virginia	01/01/2024	1	40000

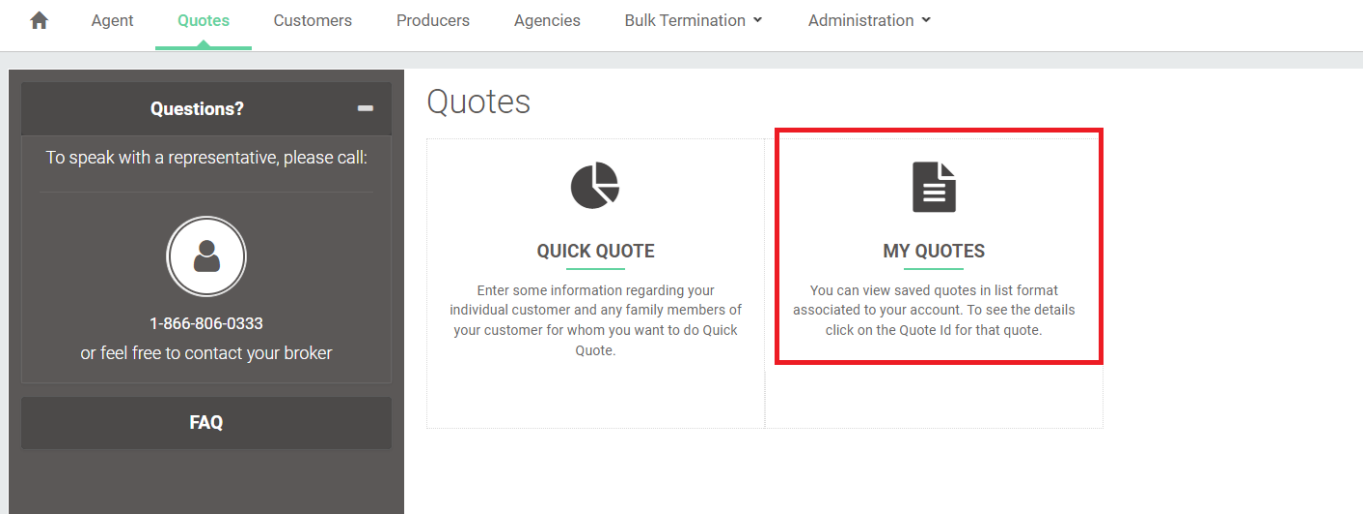
Customer Details

First Name	Last Name	Relation	Gender	Date of Birth	Tobacco	Pregnant	Actions
John	Smith	Applicant	Male	05/10/1992	No	No	

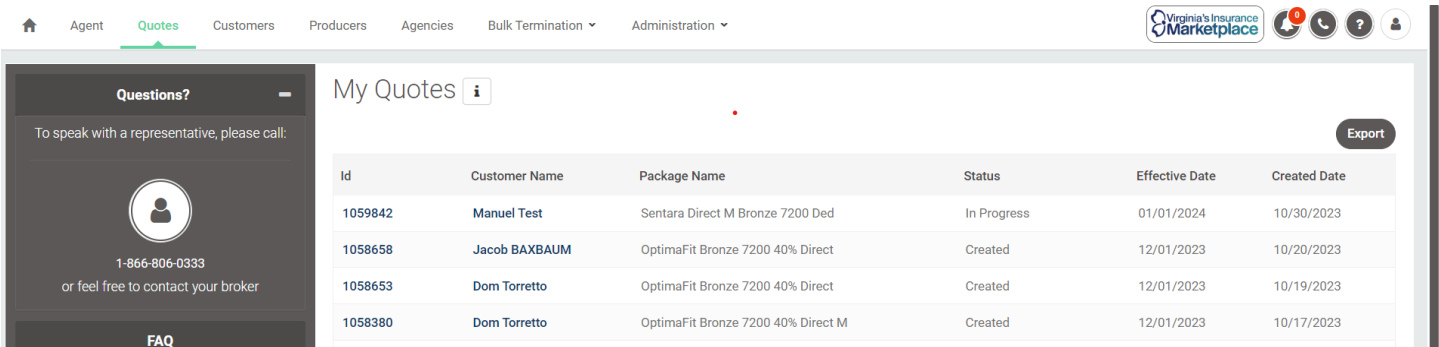
Add Another Person

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.



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.

The screenshot shows the 'Customers' tab selected in the top navigation bar. On the left is a sidebar menu with options: PCP Details, Coverage, Coverage Administration, Current Monthly Premium, Dependents, Address, Quotes, Producer, Renewal Center, Renewal Documents, and FAQ. The main content area displays 'Personal Information' for a customer named Phillip Baxter. The information includes: Name: Phillip Baxter, Status: Active, Phone: (703) 964-1872, Sponsor Id, Subscriber#: 464499-01, Renewal Date, Effective Date: 01/01/2024, Customer#: B677072P, Email: philip@yopmail.com, Termination Date, Termination Reason, and Association Name: Optima Contact Center Agency. Below this is a list of expandable sections: Additional Member Info, PCP Details, Coverage, Coverage Administration, Current Monthly Premium, Dependents, Address, Quotes, and Producer, each with a plus icon to expand.

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

The screenshot shows the 'Individual Details' screen for a customer named Ken Bob. The left sidebar menu is the same as in the previous screenshot, but the 'Coverage' option is highlighted. The main content area shows 'Personal Information' for Ken Bob: Name: Ken Bob, Status: Active, Phone: (408) 367-7852, Sponsor Id, Subscriber#: 676833-01, Renewal Date, Effective Date: 01/01/2024, Customer#: B676833P, Email, Termination Date, Termination Reason, and Association Name. Below this is a list of expandable sections: Additional Member Info, PCP Details, and Coverage. The 'Coverage' section is expanded, showing a table with columns: Plan, Effective Date, and Termination Date. The table contains one row: Sentara Standard Gold 0 Ded ZCS, 01/01/2024, 12/31/2024. The 'Plan' cell is highlighted with a red box. There are 'Terminate' and 'Change Coverage' buttons in the top right corner.

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

Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Coverage Details

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

Show more

Change Personal Information

Manage Dependent(s)

Rate Details

Member Name	Tobacco use in last 6 months	Status	Relationship	Effective Date	Termination Date	Rate
Ken Bob	No	Active	Self	01/01/2024	12/31/2024	\$950.00

View Benefit Details

Return

Virginia's Insurance Marketplace

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.

Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Coverage Details

Subscriber Details

Name: Ken Bob

SSN: 220187852

Date Of Birth: 01/01/1978

Gender: Male

Change Personal Information

To change the information of the subscriber, please click the button below to access Virginia's Insurance Marketplace website.

Virginia's Insurance Marketplace

Change Personal Information

Manage Dependent(s)

Rate Details

Member Name	Tobacco use in last 6 months	Status	Relationship	Effective Date	Termination Date	Rate
Ken Bob	No	Active	Self	01/01/2024	12/31/2024	\$950.00

View Benefit Details

Return

Virginia's Insurance Marketplace

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.

The screenshot shows the 'Customers' tab selected in the top navigation bar. The left sidebar contains a list of options: PCP Details, Coverage, Coverage Administration, Current Monthly Premium, Dependents, Address, Quotes, Producer, Renewal Center, and Renewal Documents. The 'FAQ' button is at the bottom of the sidebar. The main content area displays 'Personal Information' for Phillip Baxter, including Subscriber#, Status, Phone, Sponsor Id, Renewal Date, Effective Date, Customer#, Email, Termination Date, Termination Reason, and Association Name. Below this is a list of expandable sections: Additional Member Info, PCP Details, Coverage, Coverage Administration, Current Monthly Premium, Dependents, Address, Quotes, and Producer.

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

The screenshot shows the 'Coverage' tab selected in the top navigation bar. The left sidebar is the same as in the previous screenshot, but the 'Coverage' option is highlighted. The main content area displays 'Individual Details' for Ken Bob, including Personal Information and a list of expandable sections: Additional Member Info, PCP Details, and Coverage. The 'Coverage' section is expanded, showing a table with columns: Plan, Effective Date, and Termination Date. The table contains one row: 'Sentara Standard Gold 0 Ded ZCS' with an effective date of 01/01/2024 and a termination date of 12/31/2024. The 'Sentara Standard Gold 0 Ded ZCS' text is highlighted with a red box. There are 'Terminate' and 'Change Coverage' buttons in the top right corner of the main content area.

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

Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Coverage Details

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

Show more

Per Month

\$750.00

Change Personal Information

Manage Dependent(s)

Rate Details

Member Name	Tobacco use in last 6 months	Status	Relationship	Effective Date	Termination Date	Rate
Ken Bob	No	Active	Self	01/01/2024	12/31/2024	\$950.00

View Benefit Details

Return

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.

Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Coverage Details

Subscriber Details

Name: Ken Bob

SSN: 220187852

Date Of Birth: 01/01/1978

Gender: Male

Plan Details

Manage Dependent(S)

To add a dependent or remove a dependent to the coverage, please click the button below to access Virginia's Insurance Marketplace website.

Virginia's Insurance Marketplace

Change Personal Information

Manage Dependent(s)

Rate Details

Member Name	Tobacco use in last 6 months	Status	Relationship	Effective Date	Termination Date	Rate
Ken Bob	No	Active	Self	01/01/2024	12/31/2024	\$950.00

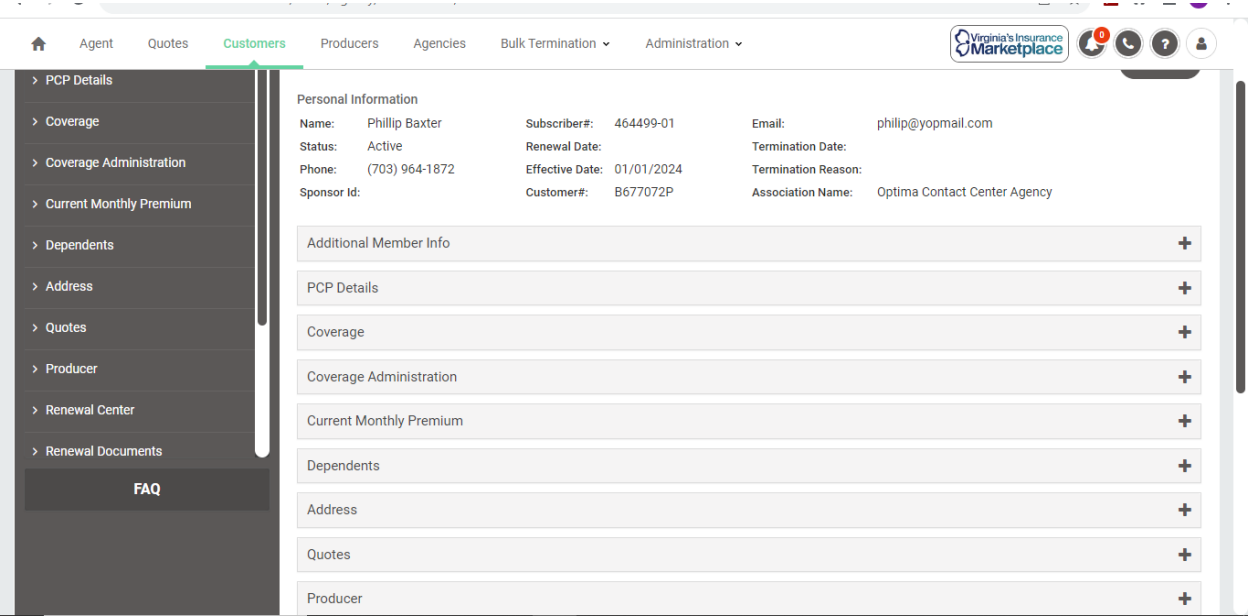
View Benefit Details

Return

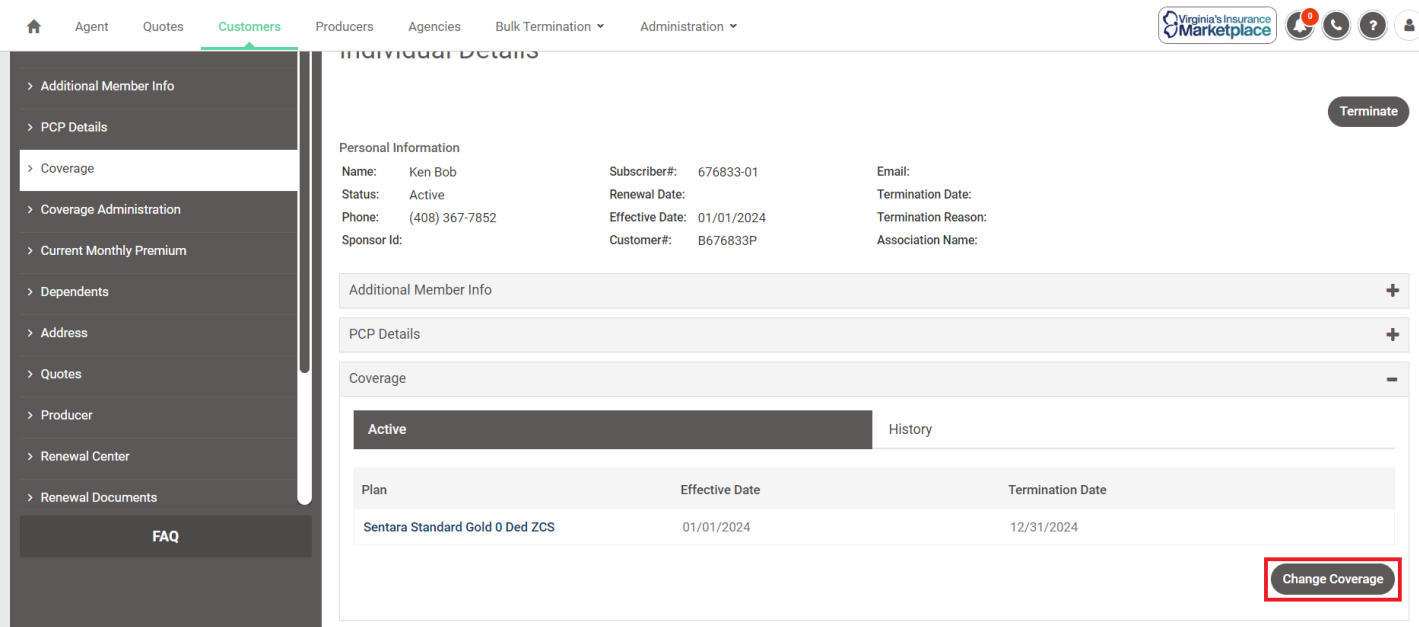
4.3 Change Coverage

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.

HomeAgentQuotesCustomersProducersAgenciesBulk TerminationAdministration

Additional Member Info

PCP Details

Coverage

Coverage Administration

Current Monthly Premium

Dependents

Address

Quotes

Producer

Renewal Center

Renewal Documents

FAQ

Individual Details

Terminate

Personal Information

Name:Ken BobSubscriber#:676833-01Email:

Status:ActiveRenewal Date:Termination Date:

Phone:(408) 367-7852Effective Date:01/01/2024Termination Reason:

Change Plan

To initiate and complete the plan change transaction, please click the button below to access Virginia's Insurance Marketplace website.

Virginia's Insurance Marketplace

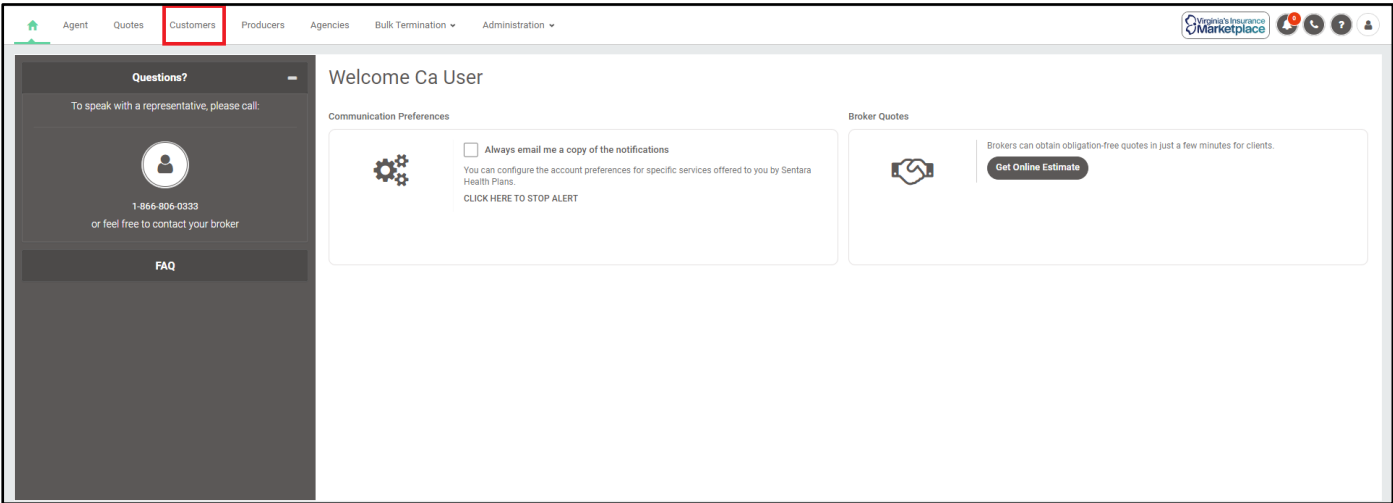
ActiveHistory

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

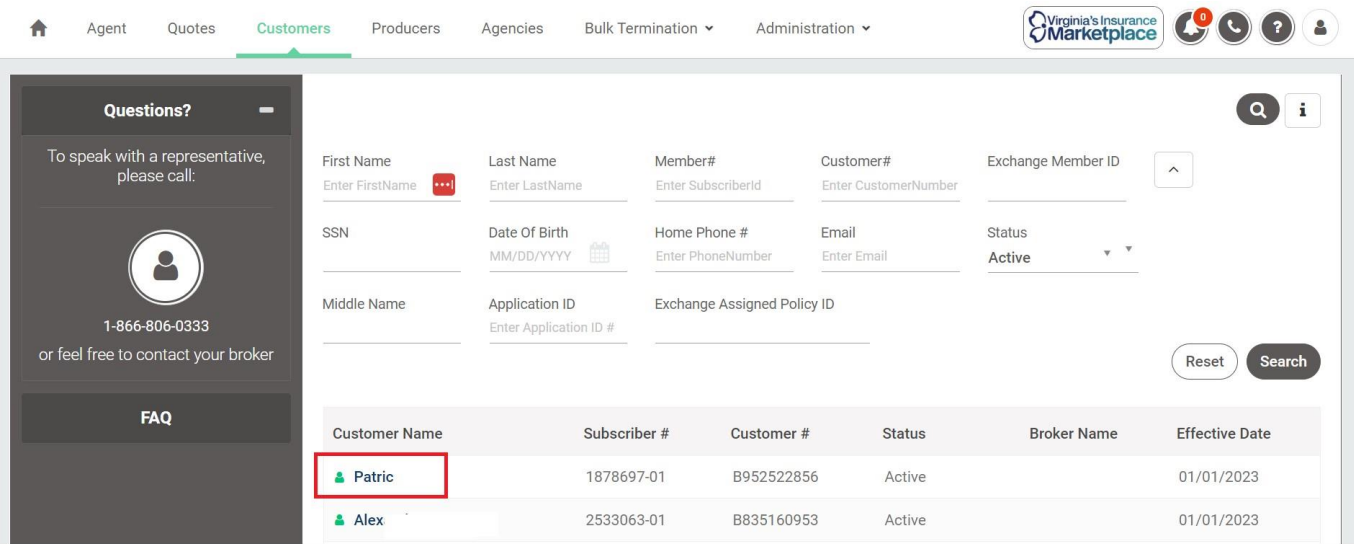
Change Coverage

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).

Home

Agent

Quotes

Customers

Producers

Agencies

Bulk Termination

Administration

Virginia's Insurance Marketplace

> Coverage Administration

> Current Monthly Premium

> Dependents

> Address

> Quotes

> Producer

> **Renewal Center**

> Renewal Documents

> Payments

Individual Details

Terminate

Personal Information

Name: PATRICIA

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

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.

Home

Agent

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Customers

Producers

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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

Coinurance: 20%

Deductible: \$1000 per person | \$2000 per group

Show more

Tax Credit Eligible

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

Home 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 Show more	<div>\$ Tax Credit Eligible</div> <div>Monthly Premium</div> <div>\$854.98</div> <div>Rate Effective Date : 1/1/2024 Rate Termination Date : 12/31/2024</div> <div>\$764.00</div> <div>2022 Advance Premium Tax Credit (APTC)</div> <div>\$90.98</div> <div>Estimated 2023 Monthly Premium</div>
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%



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.

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

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.

Home

Agent

Quotes

Customers

Producers

Agencies

Bulk Termination

Administration

Virginia's Insurance Marketplace

Help

Support

Feedback

Profile

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

Coinurance:
20%

Deductible:
\$1000 per person | \$2000 per group

Show more

Tax Credit Eligible

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

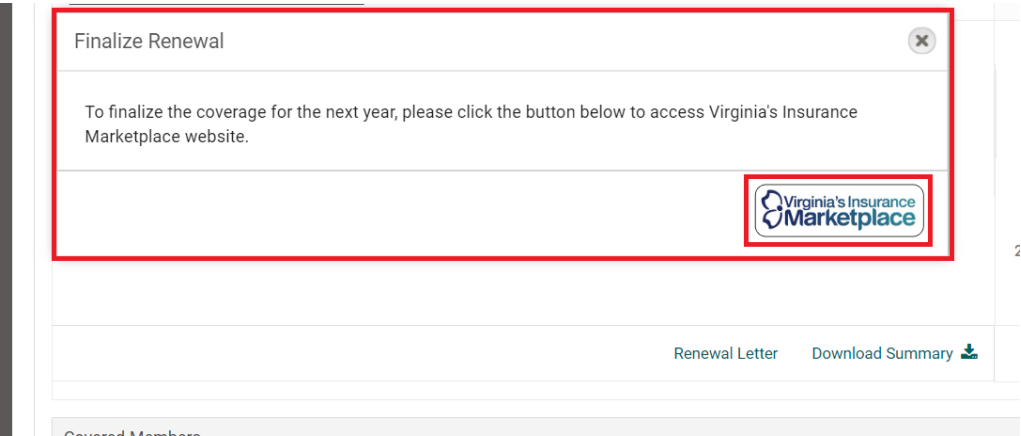
Renewal Letter

Download Summary

Covered Members

Finalize Renewal

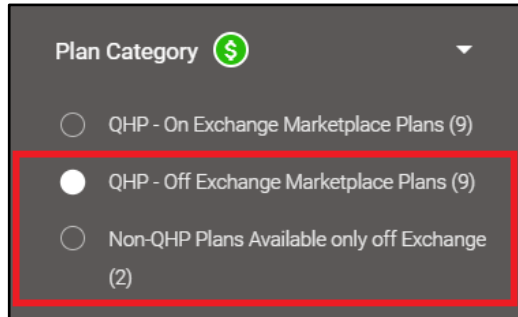
The system will display below popup with the below message indicating that to finalize the coverage for the next year you will have to go to Virginia’s Insurance Marketplace Website. You can click on the **Virginia’s Insurance Marketplace Website** logo to get redirected by the system to the Virginia’s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



5 Quoting and Enrollment (Off-Exchange)

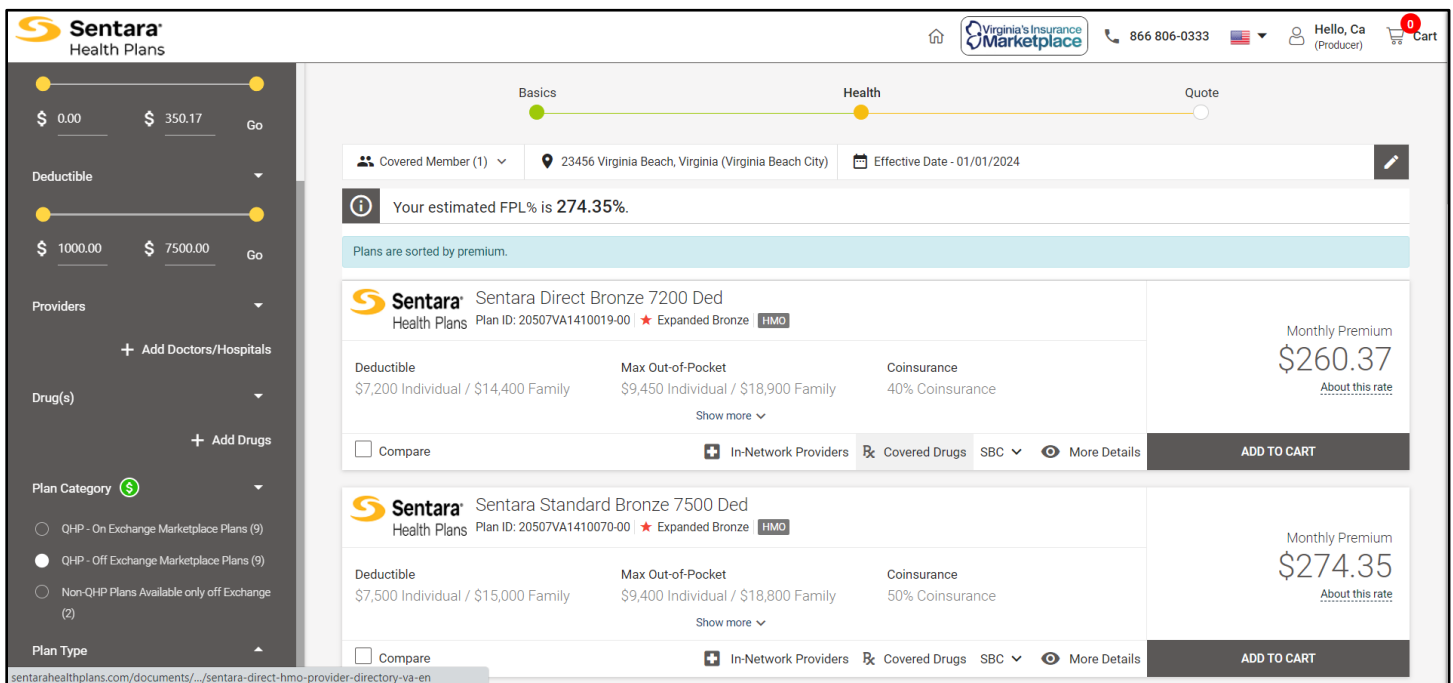
5.1 Start Quoting Process

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.



The screenshot shows a dropdown menu for 'Plan Category' with a green dollar sign icon. Three options are listed: 'QHP - On Exchange Marketplace Plans (9)', 'QHP - Off Exchange Marketplace Plans (9)', and 'Non-QHP Plans Available only off Exchange (2)'. The 'QHP - Off Exchange Marketplace Plans (9)' option is highlighted with a red rectangular border.

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.

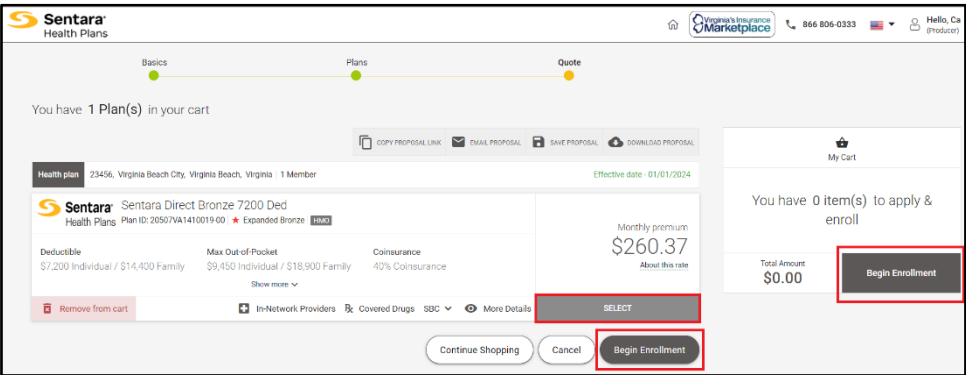


The screenshot displays the Sentara Health Plans portal interface. On the left is a sidebar with filters for Deductible, Providers, Drug(s), Plan Category (selected as 'QHP - Off Exchange Marketplace Plans (9)'), and Plan Type. The main content area shows a progress bar with 'Basics', 'Health', and 'Quote' steps. Below the progress bar, user information is displayed: 'Covered Member (1)', '23456 Virginia Beach, Virginia (Virginia Beach City)', and 'Effective Date - 01/01/2024'. A message states 'Your estimated FPL% is 274.35%'. The plan listing shows two plans, both sorted by premium. The first plan is 'Sentara Direct Bronze 7200 Ded' with a monthly premium of \$260.37. The second plan is 'Sentara Standard Bronze 7500 Ded' with a monthly premium of \$274.35. Each plan listing includes details on Deductible, Max Out-of-Pocket, and Coinsurance, along with buttons for 'Compare', 'In-Network Providers', 'Covered Drugs', 'SBC', 'More Details', and 'ADD TO CART'.

Plan Name	Plan ID	Monthly Premium
Sentara Direct Bronze 7200 Ded	20507VA1410019-00	\$260.37
Sentara Standard Bronze 7500 Ded	20507VA1410070-00	\$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

Close

Save

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.

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.

The screenshot shows the 'Subscriber Application' interface. On the left is a sidebar with 'Questions?' and contact information. The main area has a progress bar with five steps: Overview (1), Your Household (2), Coverage Detail (3), Supporting Information (4), and Authorizations (5). The 'Coverage Detail' section is active, showing plan details for 'Sentara Direct Bronze 7200 Ded' with an effective date of 01/01/2024 and a monthly premium of \$260.37. Below this is a table for 'Covered Members' with one entry: Johnathan Luiz, born 10/05/1992, male, no tobacco usage, at a rate of \$260.37. At the bottom right, the 'Next' button is highlighted with a red box.

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

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

The screenshot shows the 'Insurance Broker and Agency' section. The progress bar now highlights step 4, 'Supporting Information'. The section prompts the user to enter broker and agency information. Fields for 'Broker Name' (containing 'Ca User') and 'Agency Name' (containing 'Optima Contact Center Agency') are visible. An 'Add' button is highlighted with a red box. At the bottom right, the 'Next' button is also highlighted with a red box.

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

The screenshot shows the 'Attachments' section. The progress bar highlights step 4, 'Supporting Information'. The section prompts the user to ensure required documents are attached. A table with columns 'Attachment Type' and 'File Name' is shown, currently containing 'No Data Found'. An 'Add' button is highlighted with a red box. At the bottom right, the 'Next' button is also highlighted with a red box.

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

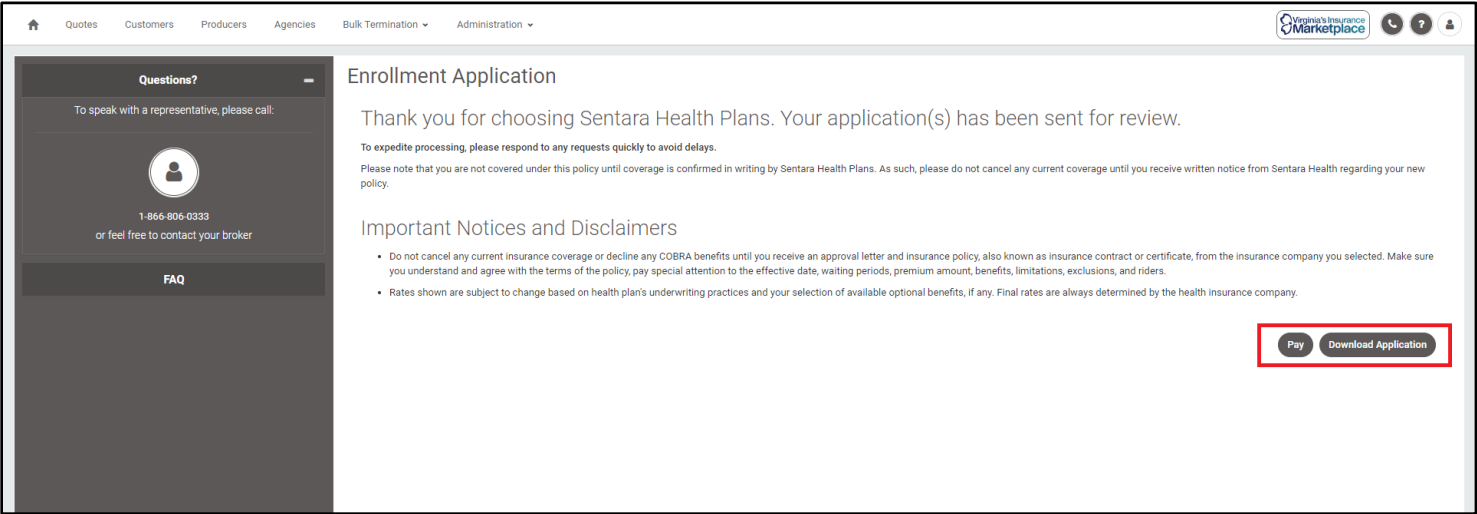
The screenshot shows the 'Subscriber Application' page for Accidental and Sickness Insurance. The page has a sidebar on the left with a 'Questions?' section containing a contact number (1-866-806-0333) and a 'FAQ' link. The main content area features a progress bar at the top with five steps: Overview (1), Your Household (2), Coverage Detail (3), Supporting Information (4), and Authorizations (5). The current step is 'Accidental and Sickness Insurance'. Below the progress bar, there is a 'Notice to Applicant Regarding Replacement of Accident and Sickness Insurance'. A confirmation statement follows: 'I confirm that I have read this replacement notice and have checked and/or initialed one of the following regarding my application:'. Two radio button options are provided: the first is selected and states 'This application is for coverage under an Sentara Health Plans Individual policy which if issued will not replace other coverage presently in force.'; the second option states '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.' Below these options is a paragraph of text explaining the replacement process. At the bottom right, there are four buttons: 'Previous', 'Cancel', 'Save And Finish Later', and 'Next' (which is highlighted with a red box).

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.

The screenshot shows the 'Authorization' screen within the 'Subscriber Application' process. The sidebar on the left is identical to the previous screen. The main content area shows the progress bar with the 'Authorizations' step (5) highlighted. The section title is 'Authorization' with a sub-header 'Certification and Authorization'. A paragraph instructs the user to review the application agreement and click a checkbox to confirm. Below this, a checkbox is checked, and the text reads: 'I, Ann Luiz have reviewed the agreement and have checked this box as my electronic signature.' The 'Applicant Name' is listed as 'Ann Luiz'. A timestamp '10/26/2023 10:23 AM - ZCYX9KXY' is shown. At the bottom, there is a paragraph of text providing instructions on how to finalize enrollment and submit documentation. At the bottom right, there are two buttons: 'Previous' and 'Submit Application' (which is highlighted with a red box).

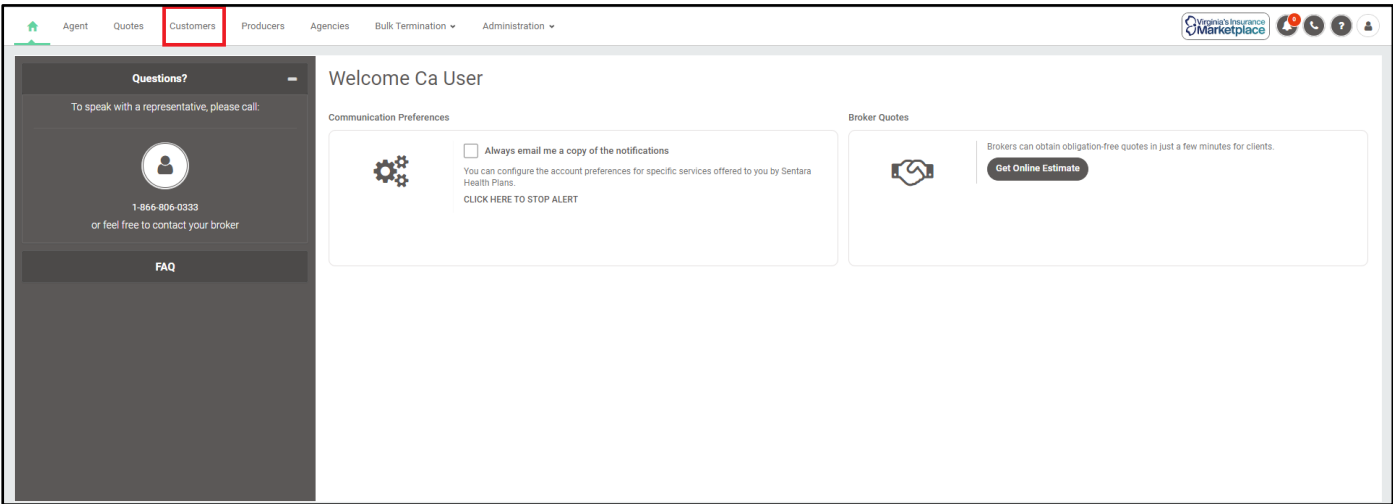
To make the payment, click on **Pay** button. The application will be redirected to make the payment.

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

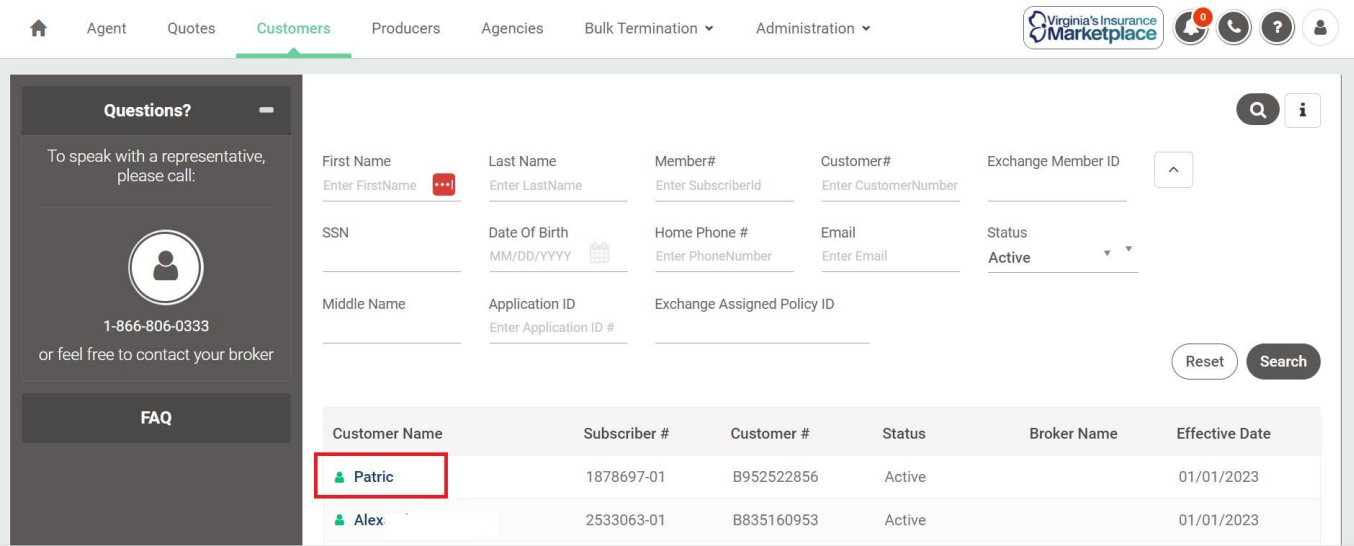


5.3 Managing Renewal (Off-Exchange Passive Renewal Quote/Plan finalization)

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).

Home

Agent

Quotes

Customers

Producers

Agencies

Bulk Termination

Administration

Virginia's Insurance Marketplace

> Coverage Administration

> Current Monthly Premium

> Dependents

> Address

> Quotes

> Producer

> **Renewal Center**

> Renewal Documents

> Payments

Individual Details

Terminate

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

+

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.

Home

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Quotes

Customers

Producers

Agencies

Bulk Termination

Administration

Virginia's Insurance Marketplace

Renewal Center

+

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

Coinurance: 40%

Deductible: \$7200 per person | \$14400 per group

Show more

Monthly Premium

\$570.47

Rate Effective Date : 1/1/2024

Rate Termination Date : 12/31/2024

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.

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Sentara Health Plans Portal User Guide

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

Virginia's Insurance Marketplace

Renewal Center

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		Monthly Premium
Coinsurance: 40%	Deductible: \$7200 per person \$14400 per group Show more ▼	\$570.47 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 see the renewal letter as shown below –

RenewalLetter_1-19466164198_20507VA141002606-20507VA141... 1 / 5 100%



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.

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
---------------------	------------------------------------------------------	----------------------------------------------------------------------------------------------------------


Show more ▼

Renewal Letter **Download Summary** ⬇️

Covered Members +

Finalize Renewal **Create Renewal Quote**

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
<p> 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.</p>			
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.

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

Virginia's Insurance Marketplace

Renewal Center

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		Monthly Premium
Coinsurance: 40%	Deductible: \$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 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.

Home Agent Quotes Customers Producers Agencies Bulk Termination Administration

Virginia's Insurance Marketplace

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		<input checked="" type="checkbox"/> Select Plan
Coinsurance: 40%	Deductible: \$7200 per person \$14400 per group	
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

Questions?

To speak with a representative, please call:

1-800-839-7250

Benefit Inquiries

(757) 552-7274(Local)
(866) 514-5916(TollFree)

Payment Center

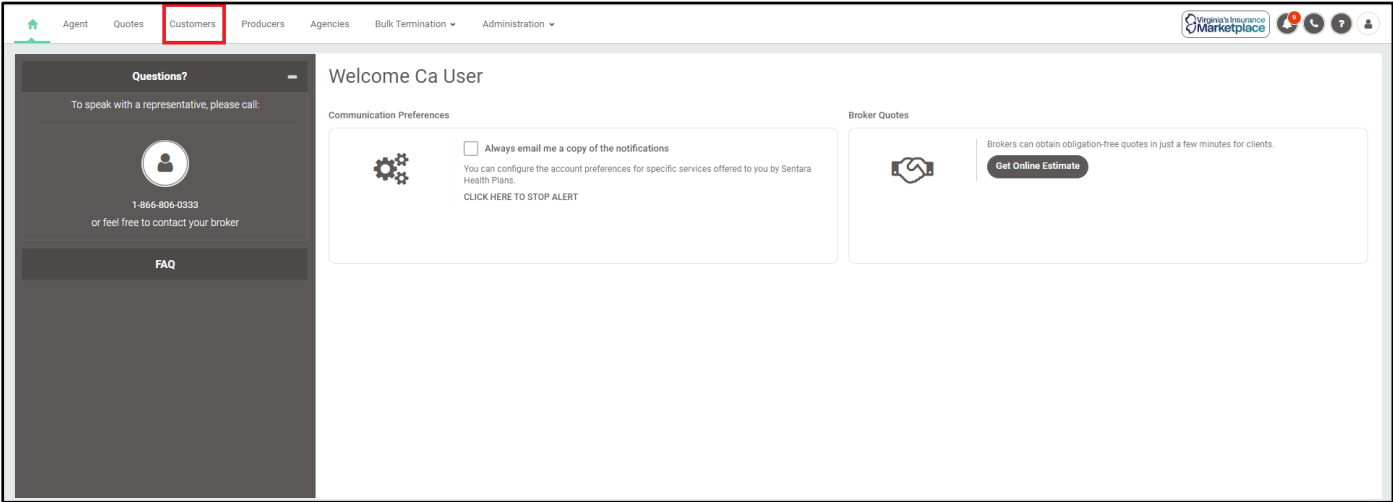
(757) 687-6434(Local)
(888) 737-5479(TollFree)

FAQ

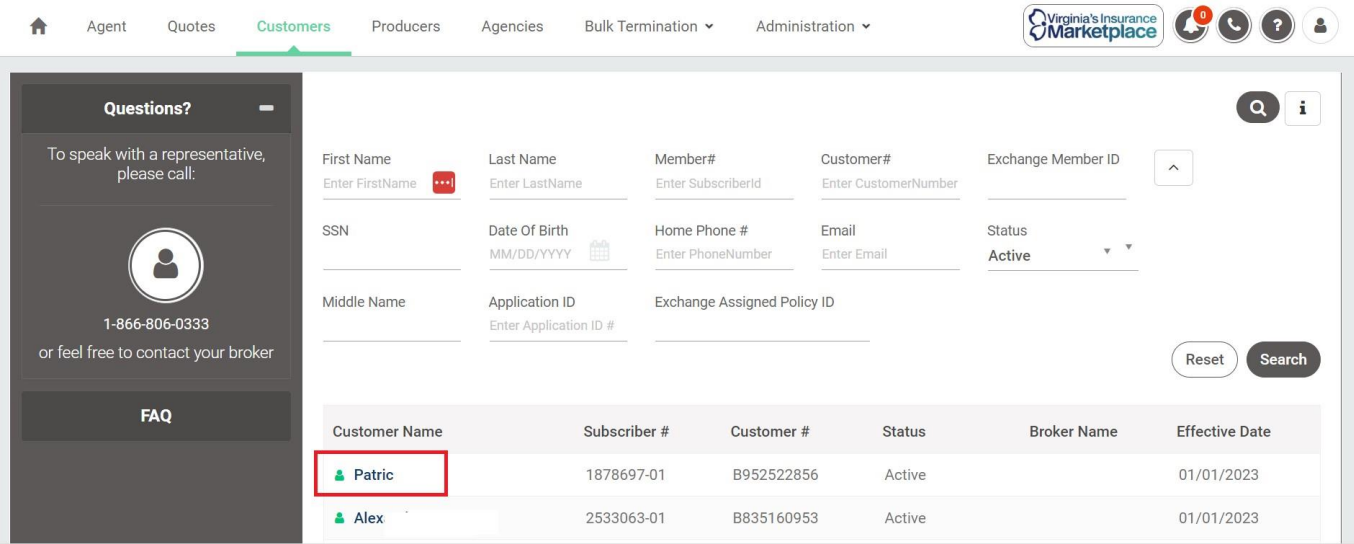
You will be navigated to the final confirmation page to review. After reviewing the information on the confirmation page, you can click on the 'Finalize Renewal' button to confirm the enrollment for the upcoming plan year.

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).

Individual Details

Terminate

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 +

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.

Renewal Center

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
Show more ▼		

[Renewal Letter](#) [Download Summary](#)

Covered Members +

Finalize Renewal **Create Renewal Quote**

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

Producer

Renewal Center

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 Show more	Monthly Premium \$570.47 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

[Terminate](#)

Personal Information

Name:	Millicent Doss	Subscriber#:	1900450-01	Email:	millicydoss@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](#)

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.

Virginia's Insurance Marketplace

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

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
Show more		
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
Show more		
		Download Summary

You will be navigated to the below screen where the 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.

Virginia's Insurance Marketplace

Home Quotes Customers Producers Agencies Bulk Termination Administration

[Show more](#)

		Monthly Premium
		\$ 570.47 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
Deductible: \$7500 per person \$15000 per group	Show more	<input checked="" type="checkbox"/> Select Plan \$ 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.

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

Terminate

Personal Information

Name:

Brienne Michelle Farmer

Status:

Active

Phone:

(721) 062-1234

Sponsor Id:

Subscriber#:

1542504-01

Renewal Date:

01/01/2023

Effective Date:

01/01/2022

Customer#:

F952587682

Email:

Brienne.Farmer@datamask.com

Termination Date:

Termination Reason:

Association Name:

Additional Member Info

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.

Home

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> 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

Change Coverage

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

Questions?

ak with a representative, please call:

1-866-806-0333

feel free to contact your broker

FAQ

Coverage Details

Subscriber Details

Name: Andrew Baker SSN: 575895050 Date Of Birth: 01/02/1990 Gender: Male

Plan Details

Sentara Direct Bronze 7200 Ded

Coinsurance: 40%

Deductible: \$7200 per person | \$14400 per group

Show more ▾

Per Month
\$269.13

Change Personal Information

Manage Dependent(s)

Rate Details

Member Name	Tobacco use in last 6 months	Status	Relationship	Effective Date	Termination Date	Rate
Andrew Baker	No	Active	Self	01/01/2024	12/31/2024	\$269.13

View Benefit Details

Download Application

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.

Add Dependent

Prefix

First Name *

Last Name *

Middle Initial

Miss

Mr.

Ms.

Mrs.

Dr.

Gender *

Male

Female

Date of Birth *

MM/DD/YYYY

Tobacco user

Yes

No

Is dependent disabled

Yes

No

Reason *

Home Address

☐ Same as Home Address

Address *

Enter Address

Eg: Apt, Unit, RR/PO Box etc.

Close

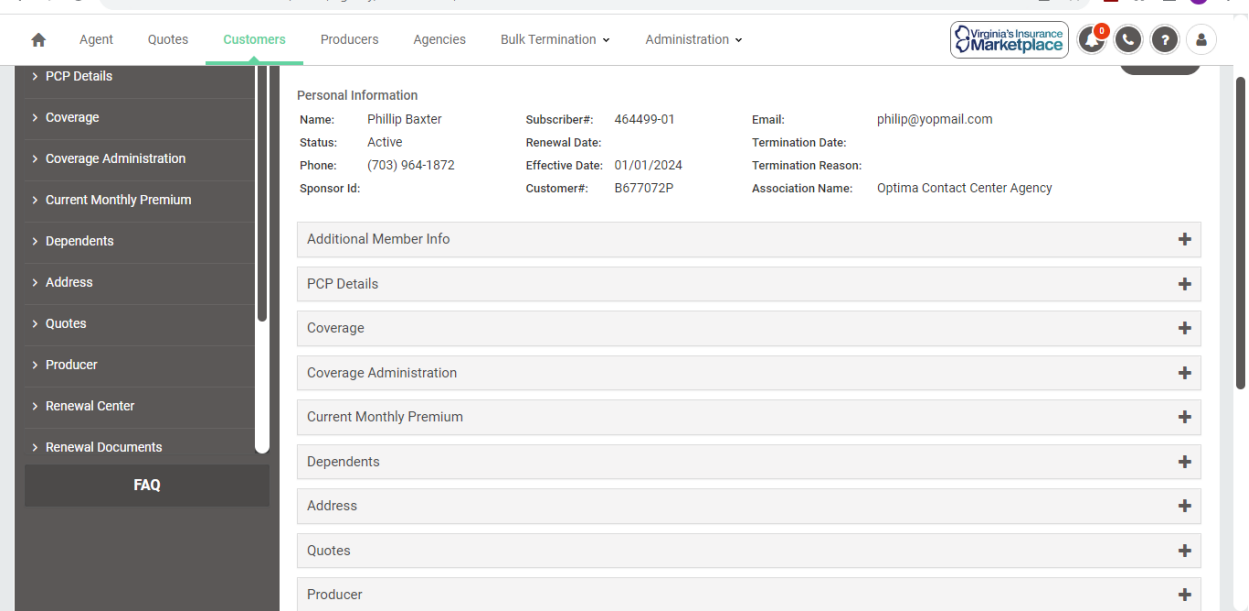
Save

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.

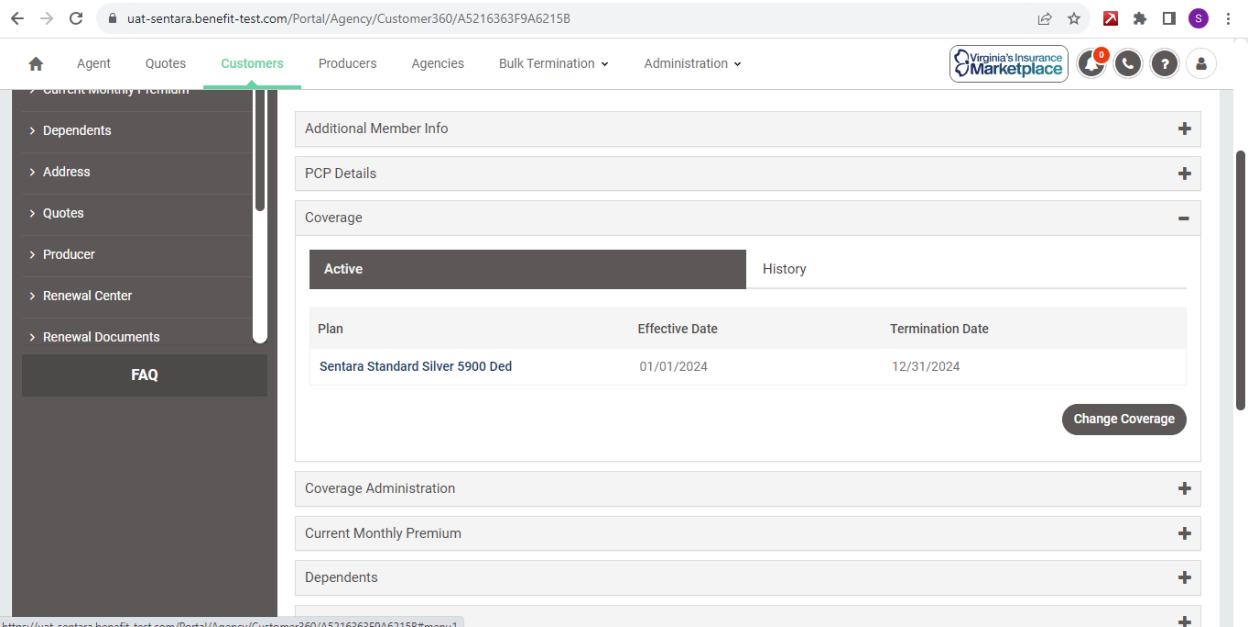
6.2 Change Coverage

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.

uat-sentara.benefit-test.com/Portal/Individual/CaptureChangeEffectiveDates?enrollmentType=OE

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

Virginia's Insurance Marketplace

Change Coverage

Plan	Total Rate	Rate Effective Date	Rate Termination Date
Sentara Standard Silver 5900 Ded	\$374.65	01/01/2024	12/31/2024

Change Effective Date *

☐ 10/01/2023 ☐ 11/01/2023 ☒ 01/01/2024

Information: 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
-----------------------	---------------------	----------------	-----------------------------

Contact Information

Phone (703) 964-1872	Email philip@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

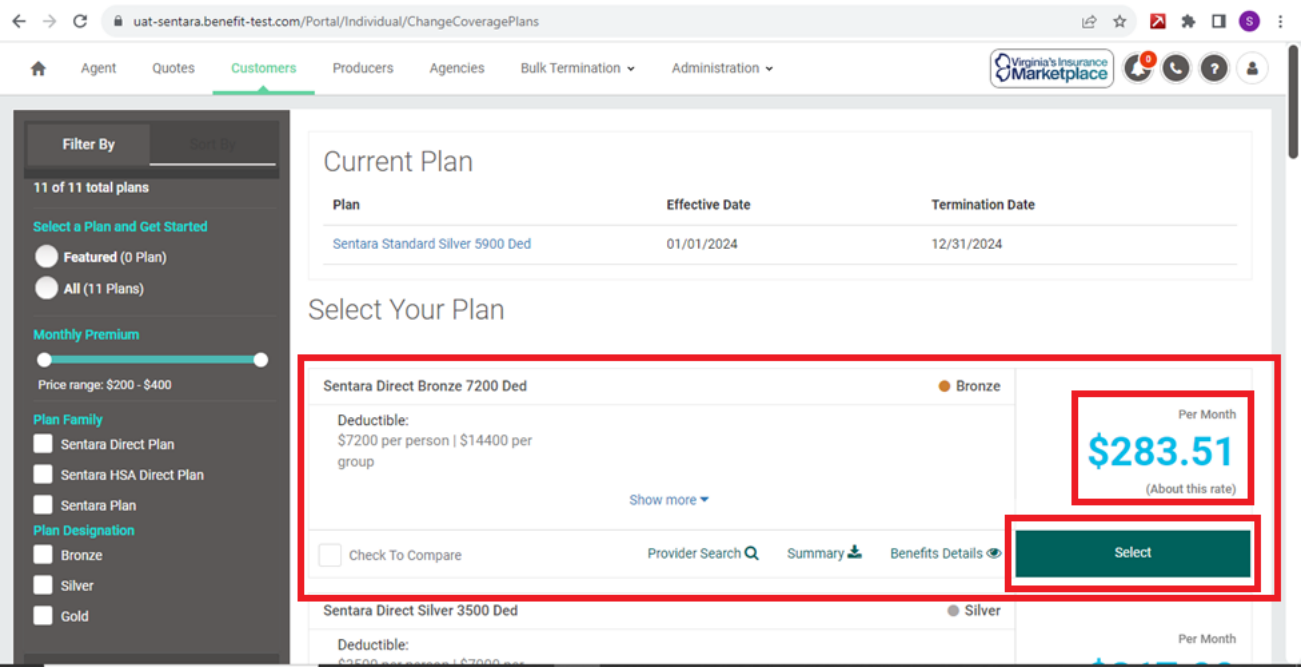
Please confirm the additional family member information and update if needed.

Name	Date of Birth	Gender	Relation	Actions
No Data Found				

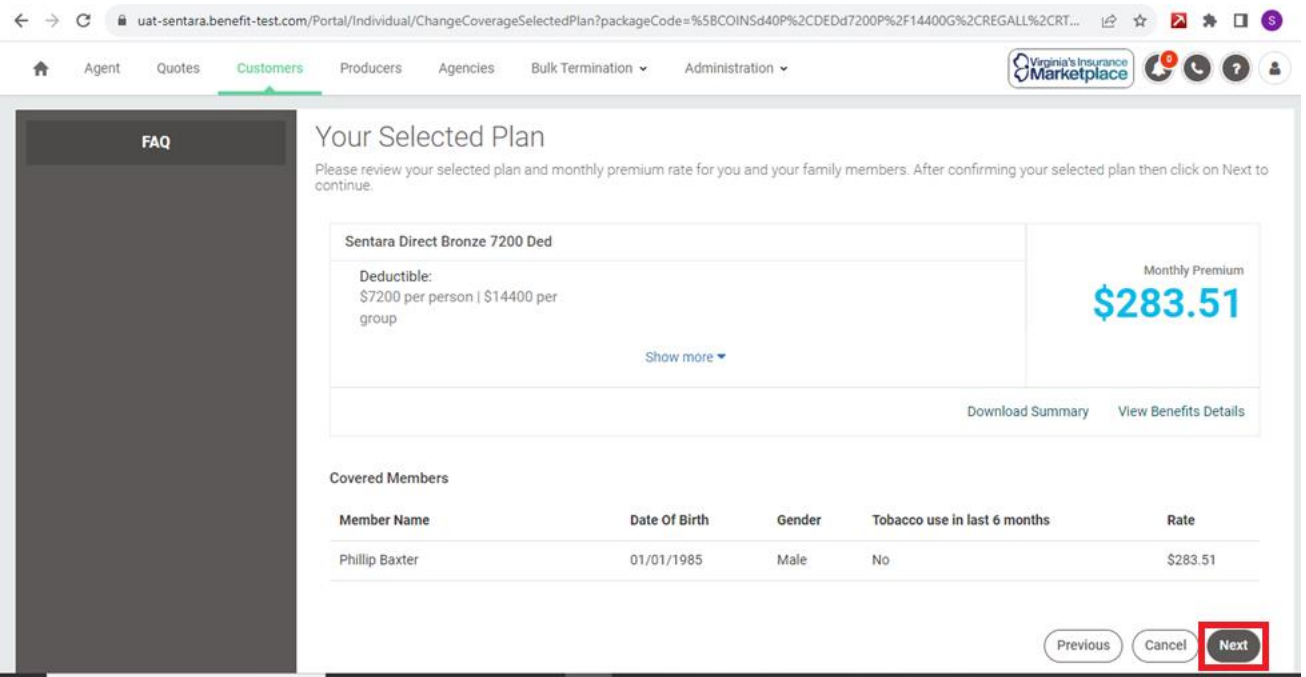
Add Spouse **Add Dependent**

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.



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



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

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

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

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	

Previous Cancel **Next**

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

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

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

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

AgentQuotesCustomersProducersAgenciesBulk TerminationAdministration

Virginia's Insurance Marketplace

Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

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.

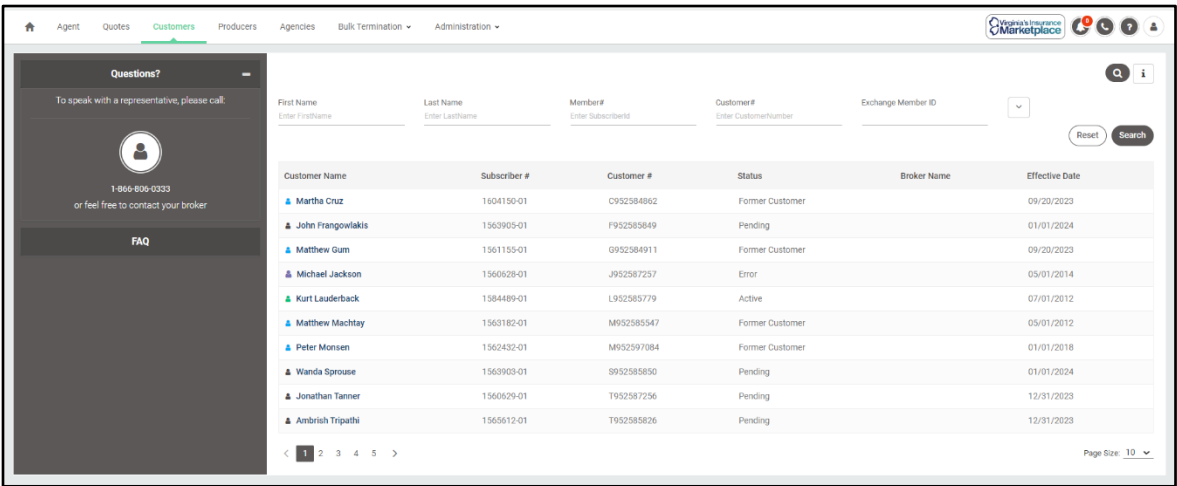
Finish

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.

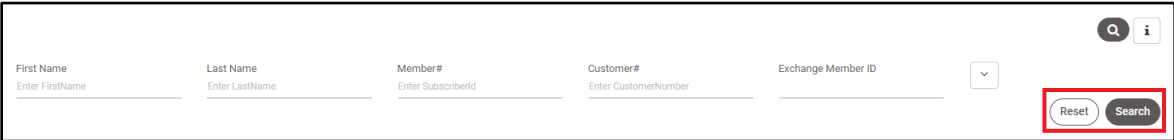
7.1 Customers Listing Screen

- 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.



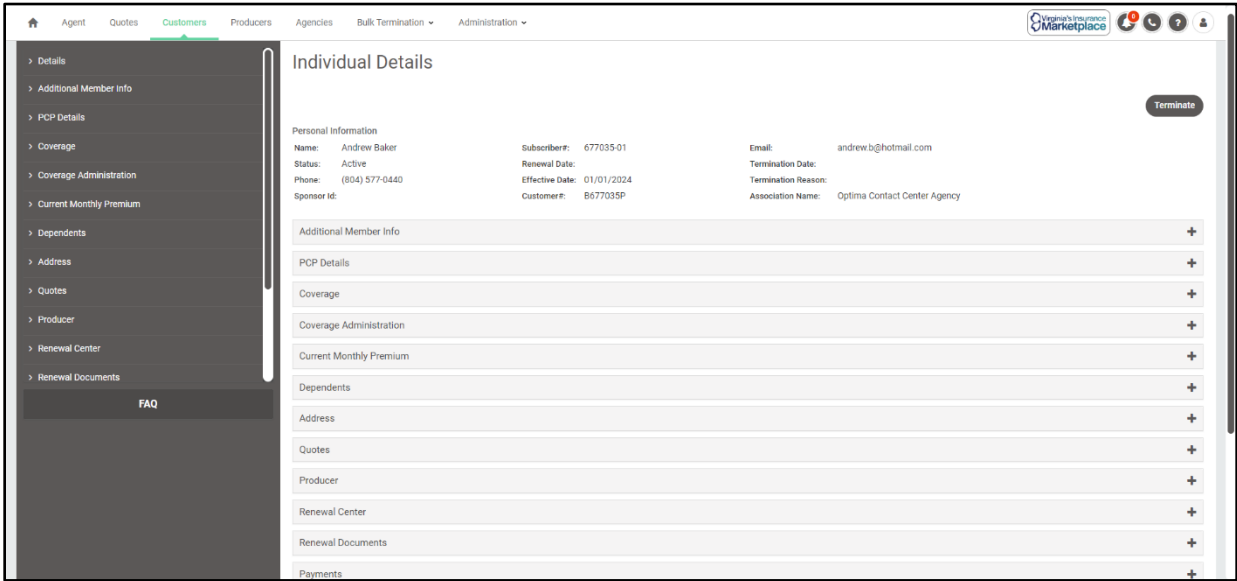
User can click the **Reset** button to clear all inputted text from the search fields.

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



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).



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.

Coverage

Active

History

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.

Coverage Administration

Enrollment Year

All

Status

All

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	
	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.

Coverage Administration

Enrollment Year

2023

Status

Active

All

2024

2023

2022

2021

2020

No coverage details available for the selected Enrollment Year and Status

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’.

Coverage Administration

Enrollment Year

2023

Status

Active

All

Active

Pending

Pending Approval

Inactive

No coverage details available for the selected Enrollment Year and Status

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.

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Coverage Administration

Current Monthly Premium

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.

Dependents								
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
	Kailee 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

Add

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.

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

Add

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

First Name

Last Name

NPN

Agency Number

Agency Name

Vendor Number

Reset

Search

Close

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

Close

Save

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.

Payments

Add

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	Cre
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.

Add Payment

Payment Amount

Payment Date

Processed Date

Payment Type

Benefit Effective Date

Plan Benefit Code

Coverage Begin Date

Coverage End Date

Payment Status

MM/DD/YYYY

MM/DD/YYYY

MM/DD/YYYY

MM/DD/YYYY

MM/DD/YYYY

MM/DD/YYYY

MM/DD/YYYY

MM/DD/YYYY

Close

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.

The screenshot shows the Virginia's Insurance Marketplace interface. The top navigation bar includes links for Agent, Quotes, Customers (highlighted), Producers, Agencies, Bulk Termination, and Administration. On the left, there is a sidebar with 'Renewal Documents' and 'FAQ'. The main content area displays a list of sections: Dependents, Address, Quotes, Producer, Renewal Center, Renewal Documents, Payments, and Responsible Person. The 'Responsible Person' section is highlighted with a red box. It contains a table with the following columns: First Name, Middle Name, Last Name, SSN, DOB, Gender, Marital Status, Relationship Type, Effective Date, Termination Date, and Home Phone. The table has one row with the following data: Aut, , Toi, , , Male, , , 12/01/2023, , . Below the table is a 'Notes' section with a '+' icon.

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.

The screenshot shows the 'Notes' section in the Virginia's Insurance Marketplace interface. It features a header 'Notes' with a minus icon. Below the header, there is a text input field with the value 'test'. To the left of the input field is a button labeled 'Add Notes' with a plus icon, and to the right is a button labeled 'Save'. Below the input field, there is a table with the following columns: Created Date, Created By, and Notes. The table has one row with the following data: 10/31/2023, Ca User, and 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.

Questions?

To speak with a representative, please call:



1-866-806-0333

or feel free to contact your broker

FAQ

First Name

Last Name

NPN

Agency Name

Agency Number

Vendor Number

Reset

Search

Producer Name	NPN	Agency Name	Agency Number	Vendor Number	DOB	Email	Fax	Phone	AltPhor
Laurence Rossen	1721377		0015Y00002wa102QAA	13341		Laurence.Rossen@datamask.com	7572009679	(650) 051-2340	
Walter McDaniel Jr	1351029		0015Y00002wa11YQAQ	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. The top navigation bar includes links for Agent, Quotes, Customers, Producers (active), Agencies, Bulk Termination, and Administration. The left sidebar has links for Details, Agencies, Customers, and FAQ. The main content area displays the producer's details: First Name: Walter, Last Name: McDaniel Jr., Date of Birth: 11/21/1991, SSN: 0035Y000495ayQAA, National Producer Number: 1351029, Producer ID: 0035Y000495ayQAA, Email: Walter.McDaniel.Jr@datamask.com, Marketing URL: https://uat-sentara.benefit-test.com/Portal/Agent/MarketingInd?id=93B87A0FA0C40B2. Below this, there are sections for Agencies and Customers. The Customers section has a search bar with fields for First Name, Last Name, Member #, Customer #, and Exchange Member ID. A search icon and a 'Search' button are highlighted with red boxes. Below the search bar is a table of customers.

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

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.

Agencies									
Agency Name	Agency Number	Vendor Number	Fax	Phone	Address1	Address2	Address3	City	Country
Health Care Options Inc	0015V00002wac1BBOAV	10717		(202)505 2417	600 Twp St SW			Dalton Bay	Denmark

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.

Questions?

To speak with a representative, please call:

1-866-806-0333
or feel free to contact your broker

FAQ

Agency Name: smith Agency Number: Vendor Number:

Reset Search

Agency Name	Agency Number	Vendor Number	Fax	Phone	Address1	Address2	Address3	City	Country	State	ZipCode	Appointment Date
Smith Insurance Inc.	4010	57322	8606914165	(860)739-3322								

Page Size: 10

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.

Agency Details

Agency Name: Virginia Farm Bureau - Richmond
Vendor #: 47238
Agency #: 0015Y00002wa11SQAQ
Agency Status: Active

Agency Type: Sub-Agency
Effective Date:
Main Phone#: (804)290-1152
Fax: 8042901095
Web:

Address 1: 12580 West Creek Pkwy
Address 2:
Zip: 23238
City: Richmond
State: VA
County: Goochland

Producers

First Name Last Name NPN

Reset Search

Producer Name	NPN	DOB	Email	Fax	Phone	AltPhone1	AltPhone2	SSN	Address1
Gary Gentilini			Gary.Gentilini@datamask.com	(804) 290-1095	(11) 521-2340				
Denise Harris			Denise.Harris@datamask.com	8042901095	(901) 116-1234		(804) 290-1116		
Jan Holder			Jan.Holder@datamask.com	8042901095	(901) 120-1234		(804) 290-1120		
Gloria Thompson	3088199	12/28/1953	Gloria.Thompson@datamask.com	(804) 290-1095	(11) 521-2340			233-88-7307	
Brenda Faulkner	17083872		Brenda.Faulkner@datamask.com	8042901095	(11) 521-2340				
Katherine Zier	17107714		Katherine.Zier@datamask.com	8042901095	(11) 521-2340				

10 Customer Termination & Reinstatement

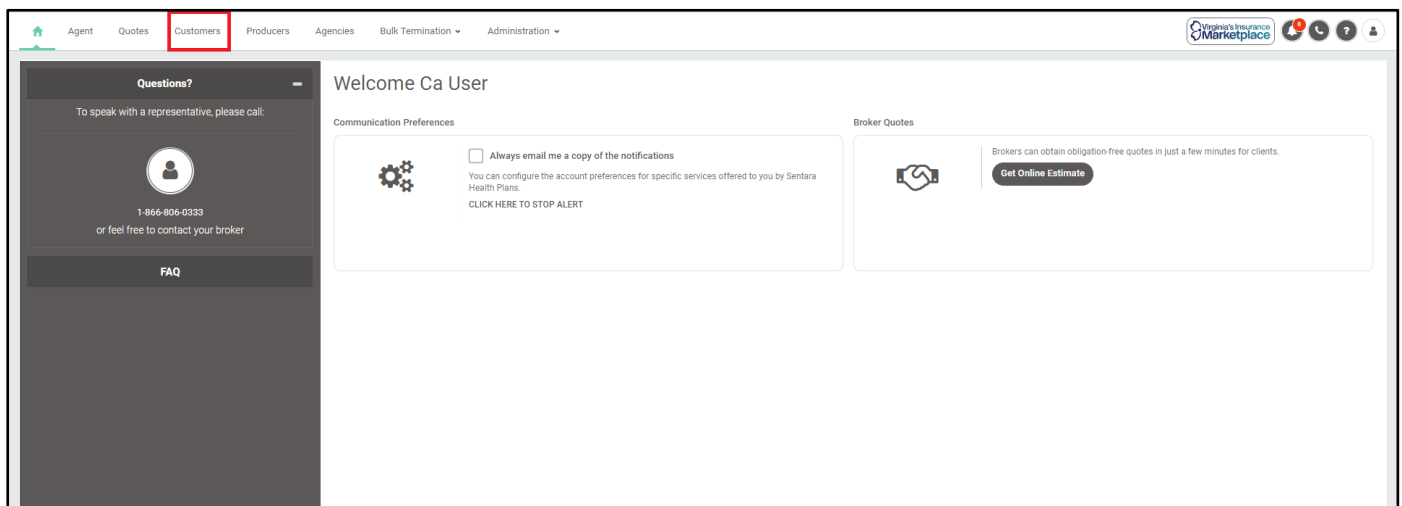
10.1 Termination

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.

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

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.

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Details

Additional Member Info

PCP Details

Coverage

Coverage Administration

Current Monthly Premium

Dependents

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Individual Details

Reinstate

Terminate

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

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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 screenshot shows the 'Terminate Customer' popup in the Virginia's Insurance Marketplace system. The popup has a close button in the top right corner. It contains the following fields:

- Termination Date ***: A date input field with a calendar icon and the format MM/DD/YYYY.
- Termination Reason ***: A dropdown menu with a search icon. The dropdown is open, showing a list of reasons: 251-Cancel Health Ins Case Sys, 252-Term Health Ins Case Sys, 520-Nonpay of initial premium, 523-Nonpay of ongoing premium, and 524-Nonpay of ongoing premiums.
- Send to CSC**: Radio buttons for 'Yes' and 'No'. The 'No' option is selected.
- Notes**: A text area for entering additional information.

At the bottom of the popup are 'Close' and 'Terminate' buttons. The background shows the 'Customers' tab in the system, with a list of customer details and buttons for 'Reinstate' and 'Terminate'.

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.

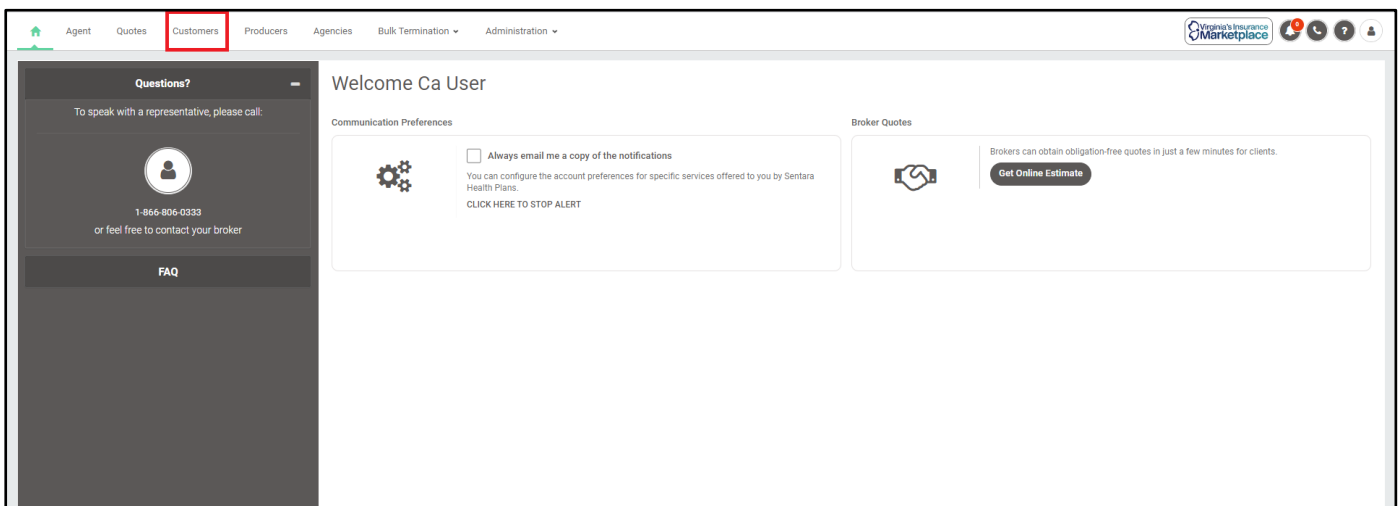
10.2 Reinstatement

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.

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 Reinstatement button.

The screenshot shows the 'Reinstate Customer' popup window. The 'Reinstatement Date' is set to 01/02/2021. The 'Reason' dropdown is set to '405-Reinstate Inactive Account'. The 'Send to CSC' option is set to 'No'. The 'Notes' field is empty. The background shows the main system interface with a sidebar menu and a top navigation bar.

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.

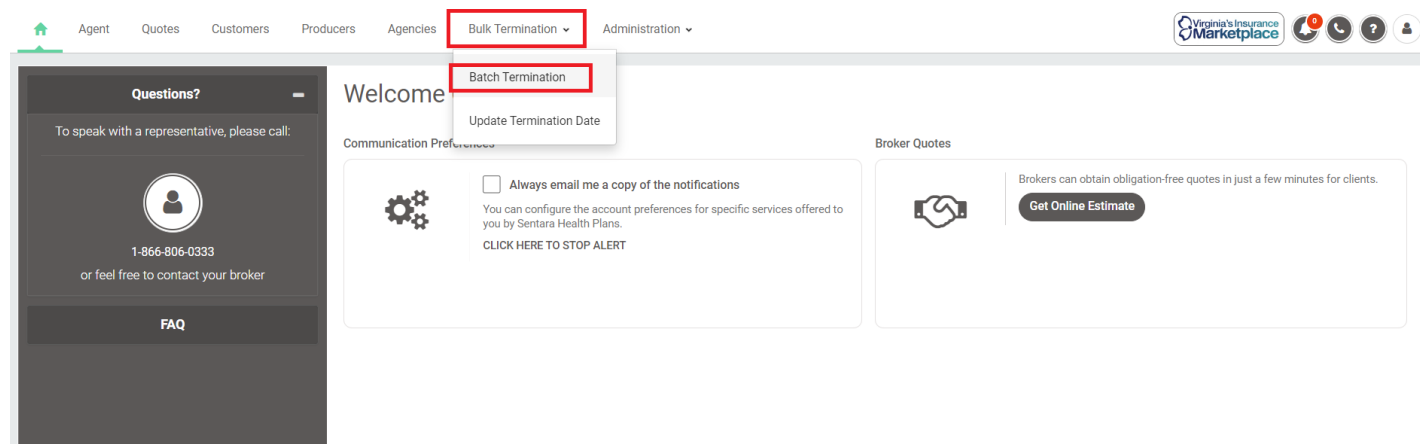
11 Bulk Termination

11.1 Batch Termination

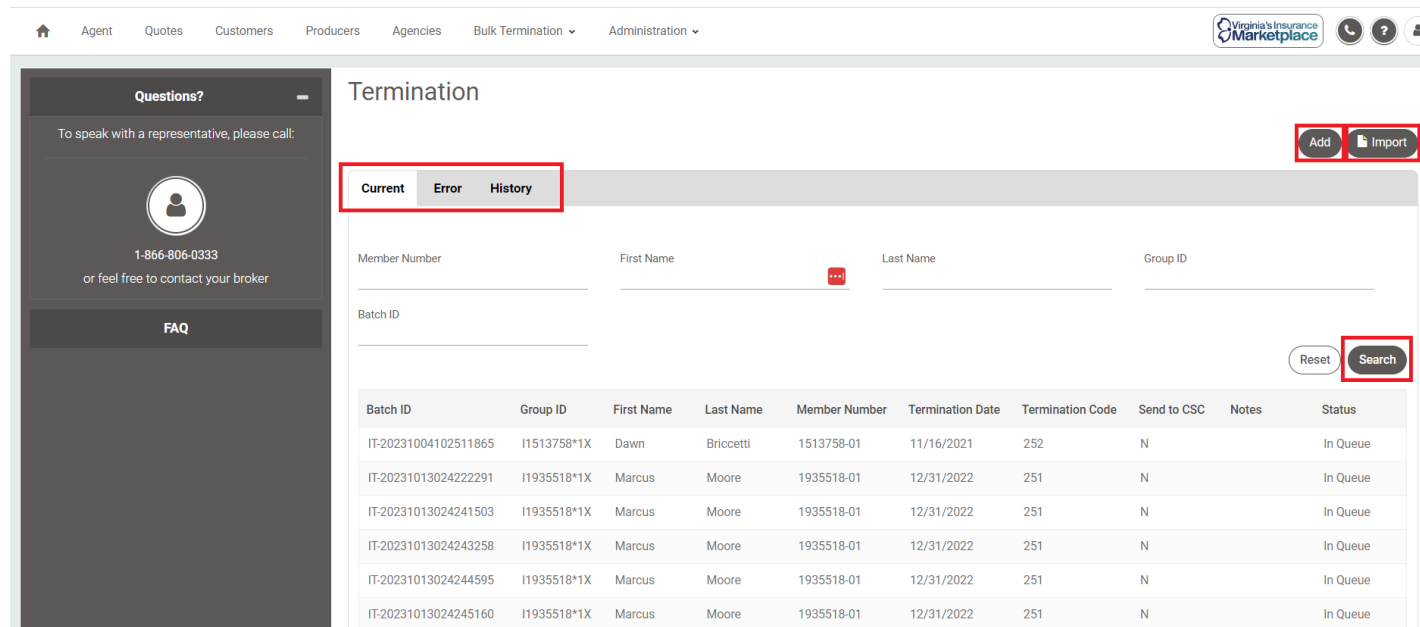
This functionality is available only for those who play the Carrier Administrator role within Sentara users list.

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.



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:

Questions?

To speak with a representative, please call:

1-866-806-0333

or feel free to contact your broker

FAQ

Termination

Add

Import

Current

Error

History

Member Number

First Name

Last Name

Group ID

Batch ID

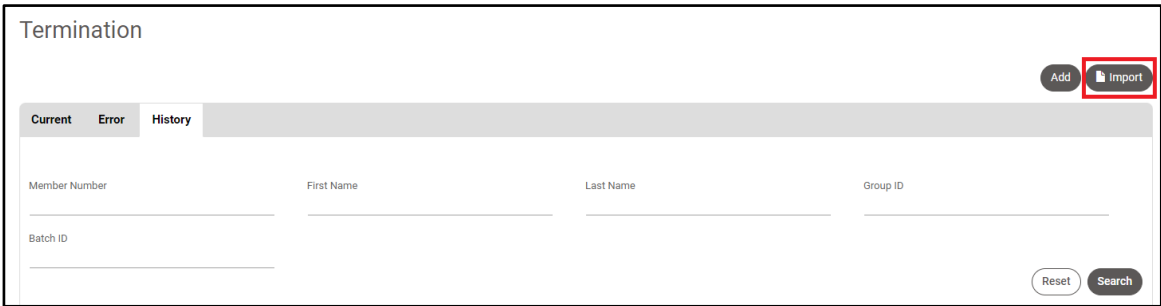
Reset

Search

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 two buttons: 'Add' and 'Import'. The 'Import' button is highlighted with a red box. Below the buttons is a tabbed interface with 'Current', 'Error', and 'History' tabs. The 'Current' tab is active. Below the tabs are four input fields: 'Member Number', 'First Name', 'Last Name', and 'Group ID'. Below these is a 'Batch ID' input field. At the bottom right, there 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 the 'Termination' page. At the top right, there are two buttons: 'Add' and 'Import'. Below them is a text 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 message is a 'Choose File' button, which is highlighted with a red box, and a text field that says 'No file chosen'. At the bottom right, there are 'Cancel' and 'Submit' buttons, with the 'Submit' button highlighted with a red box.

Add button:

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



The screenshot shows the 'Termination' page. At the top right, there are two buttons: 'Add' and 'Import'. The 'Add' button is highlighted with a red box. Below the buttons is a tabbed interface with 'Current', 'Error', and 'History' tabs. The 'Current' tab is active. Below the tabs are four input fields: 'Member Number', 'First Name', 'Last Name', and 'Group ID'. Below these is a 'Batch ID' input field. At the bottom right, there are 'Reset' and 'Search' 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 *

MM/DD/YYYY

Termination Reason *

Send to CSC

Yes

No

Member ID *

First Name *

Last Name *

Group ID *

Notes

Close

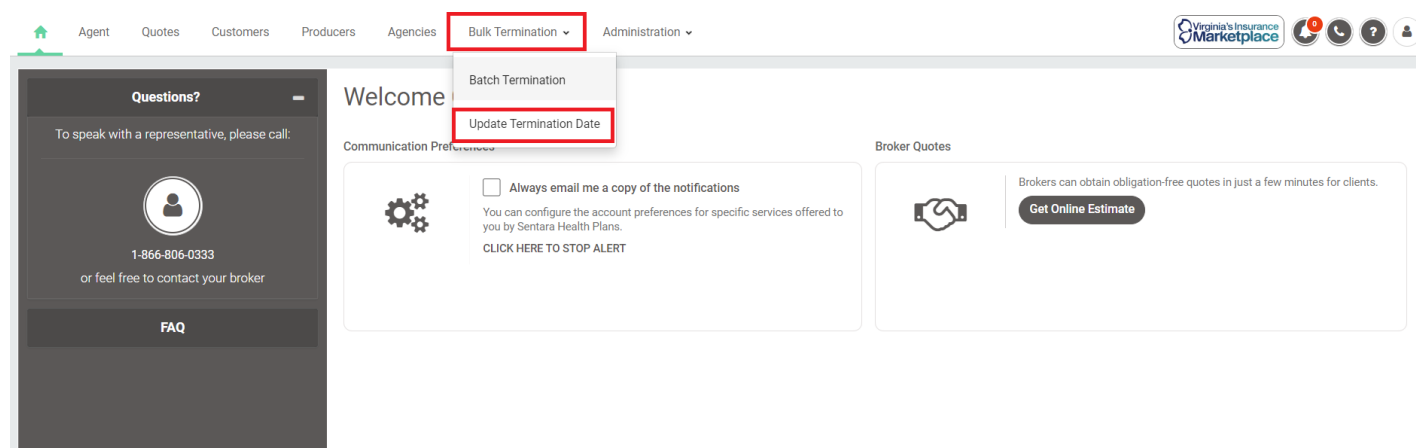
Terminate

11.2 Update Termination Date

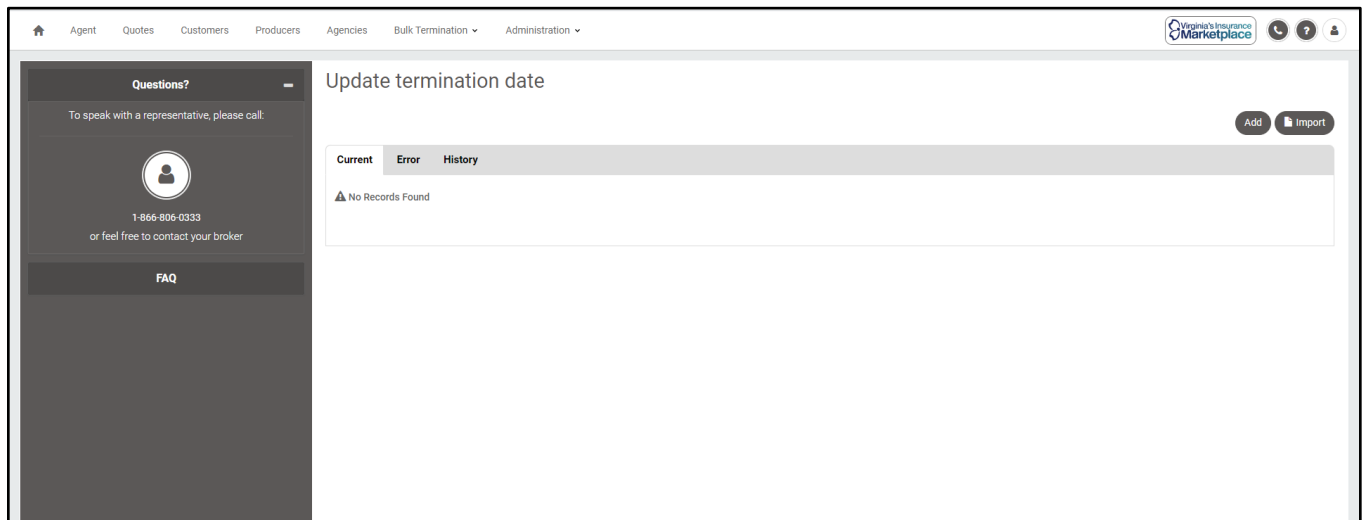
This functionality is available only for those who play the Carrier Administrator role within Sentara users list.

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:

Termination

Current Error **History**

Member Number First Name Last Name Group ID

Batch ID

Reset Search

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

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.

Update termination date

Add Import

Current Error History

No Records Found

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.

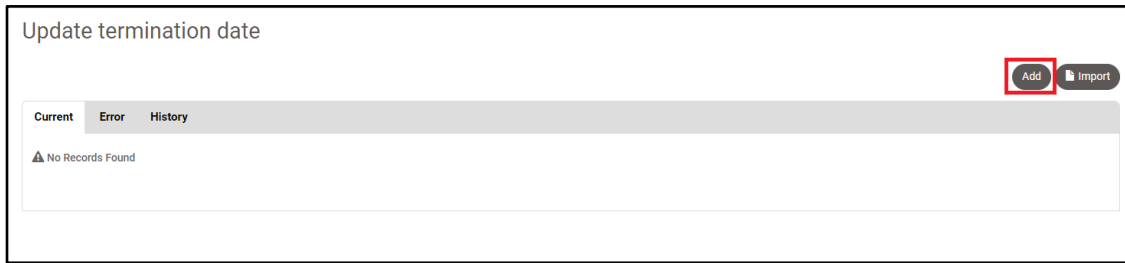
The system accepts Excel sheet records containing details of customers that are to be terminated. Click the 'Choose File' button to upload the Excel file and click 'Submit'.

Choose File No file chosen

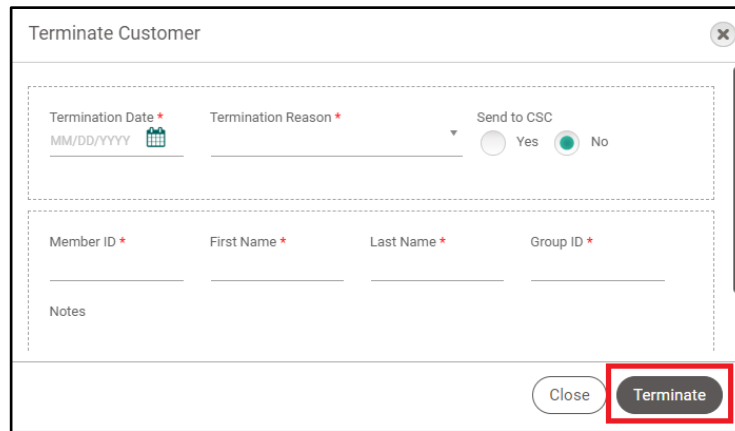
Cancel Submit

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.

Virginia's Insurance Marketplace

Agent Quotes Customers Producers Agencies Bulk Termination Administration

Details Address License National Producer Number Attachments Federal Exchange (FFM) Login FAQ

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 +

Back

12.2 Address Details

You can view your address details in the below screen.

Virginia's Insurance Marketplace

Agent Quotes Customers Producers Agencies Bulk Termination Administration

Details Address License National Producer Number Attachments Federal Exchange (FFM) Login FAQ

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
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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 in the Virginia's Insurance Marketplace portal. The left sidebar contains a menu with options: Details, Address, License (highlighted), National Producer Number, Attachments, and Federal Exchange (FFM) Login. The main content area displays the 'Broker Details' form. The 'License' section is highlighted with a red box and contains an 'Add' button, also highlighted with a red box. The 'License' section shows 'No Data Found'. Other sections include Address, National Producer Number, Attachments, and Federal Exchange (FFM) Login, each with a '+' button. The top navigation bar includes links for Agent, Quotes, Customers, Producers, Agencies, Bulk Termination, and Administration. The top right corner features the Virginia's Insurance Marketplace logo and user profile icons.

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

The screenshot shows the 'Broker Details' page with the 'Add License' popup open. The popup is highlighted with a red box and contains the following fields: License Type (dropdown), License # (text), Licensee Name (text), Effective Date (calendar icon), and Expiration Date (calendar icon). The 'Save' button is highlighted with a red box. The background shows the 'Broker Details' page with the 'License' section highlighted. The top navigation bar and user profile icons are visible.

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.

Virginia's Insurance Marketplace

Agent Quotes Customers Producers Agencies Bulk Termination Administration

Details Address License National Producer Number Attachments Federal Exchange (FFM) Login

FAQ

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 +

Producer# 10307944 Edit

Attachments +

Federal Exchange (FFM) Login +

Back

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

Virginia's Insurance Marketplace

Agent Quotes Customers Producers Agencies Bulk Termination Administration

Details Address License National Producer Number Attachments Federal Exchange (FFM) Login

FAQ

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 +

Producer# 10307944 Confirm Producer# 10307944 Cancel Save

Attachments +

Federal Exchange (FFM) Login +

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.

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

Sentara Health Plans Portal User Guide

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