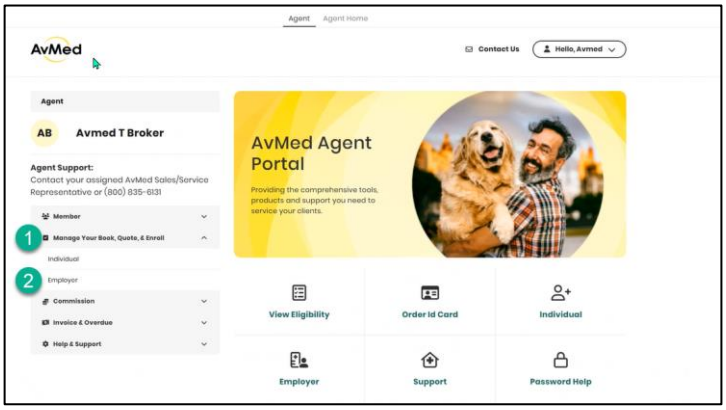
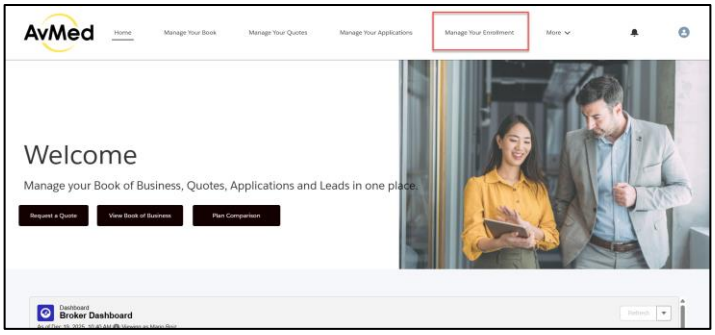
AvMed Agent e3 Web Enrollment User Guide

This guide highlights the steps for managing group enrollment on the e3 web enrollment platform.

- View the group details, including group number and effective dates
- Add or remove subscribers and their dependents
- View member plan information
- Update member demographics
- Process life events
- Terminate members
- Make corrections
- Manage Open Enrollment

After logging into AveMed.org, the secure Agent Portal displays. To access the e3 Web Enrollment portal: • Click **Manage Your Book, Quote, & Enroll** • Click **Employer** (for commercial business) Please note that access to the Quote and Enroll portal requires user set up. If you are not able to access the portal, please contact your Sales Representative.	
The Quoting and Web Enrollment Home page is displayed. • Click on **Manage Your Enrollment**	

* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

The Accounts List view displays.

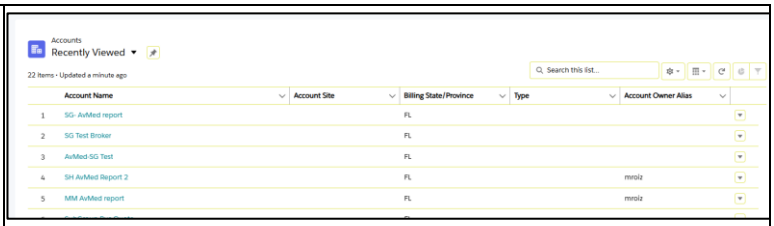
*IMPORTANT NOTE: The Accounts list defaults to **Recently Viewed**.

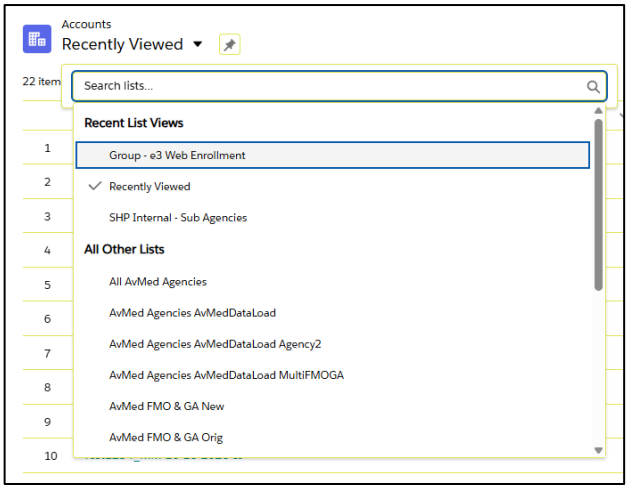
To select a different list view click the arrow and search the list for more options (see the next section of this guide for more information)

For a full listing of Groups, click the arrow and select **Group – e3 Web Enrollment**.

This list displays all web enrolled groups in Alphabetical order.

Click on the Account Name to view the Group Enrollment Details Record/Page.





Group Details Page

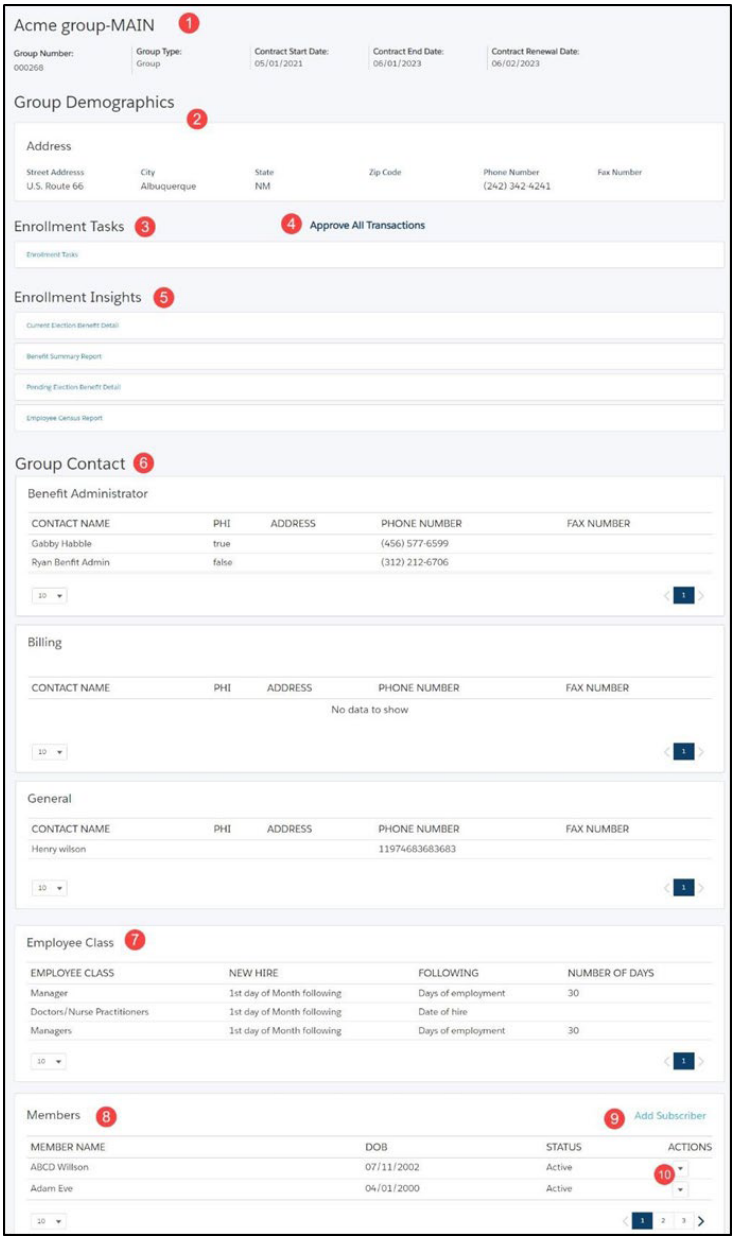
To view or edit a group:

- Click the dropdown arrow under the **Action** Header next to the group's name
- Select **View Group/Subgroup**

* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

The **Group Demographics** page is displayed. You can:

1. Group Name and group information including group number and Contract dates
2. View group demographics
3. *Engage in enrollment tasks
4. *Approve transactions
5. *View enrollment insights
    - **These tasks are usually only utilized when a group allows members to manage their enrollment*
6. View group contacts, including benefits administration, billing, and general contacts
7. View employee classes
8. View the members
9. Add a new subscriber
10. Actions - Modify existing subscriber information by clicking the **Actions** arrow at the far right of the row



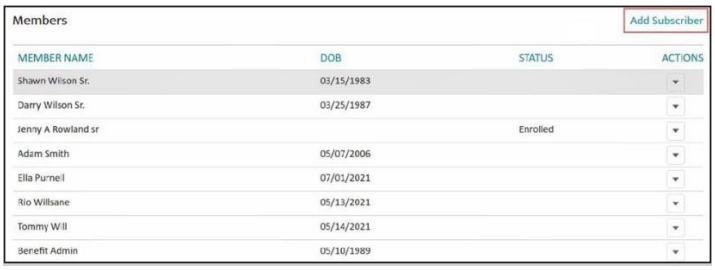
* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

Add Subscriber

To Add a new Subscriber:

- On the **Group Details** page scroll to the **Members** section (located at the very bottom of the page).

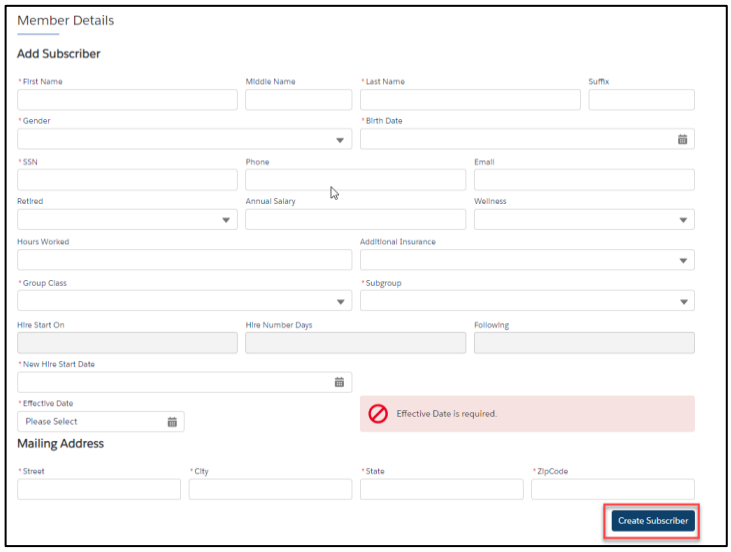
In the Members section, click the **Add Subscriber** button.



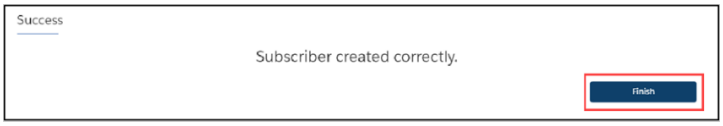
Enter the required details about the subscriber. Required information includes:

- Demographic information: first and last name, gender, birthdate, phone number, and address
- Group class
- New hire start date

Click **Create Subscriber** button when you are done entering the information.

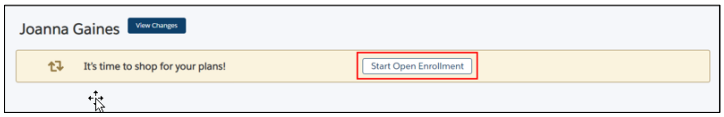


If the subscriber was successfully created, a confirmation message will display. Click **Finish.**

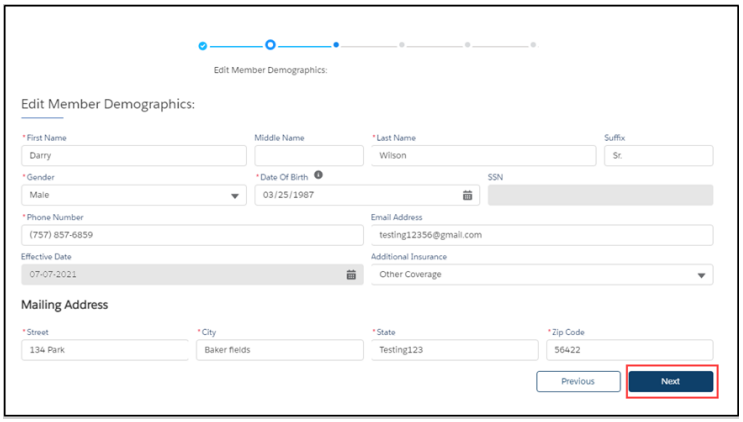
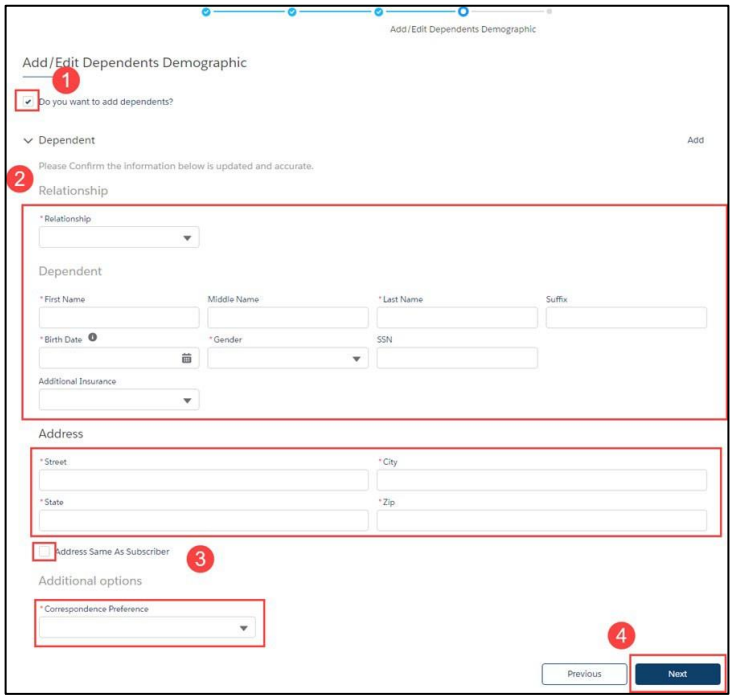


The site auto directs you to the **Member Details** page.

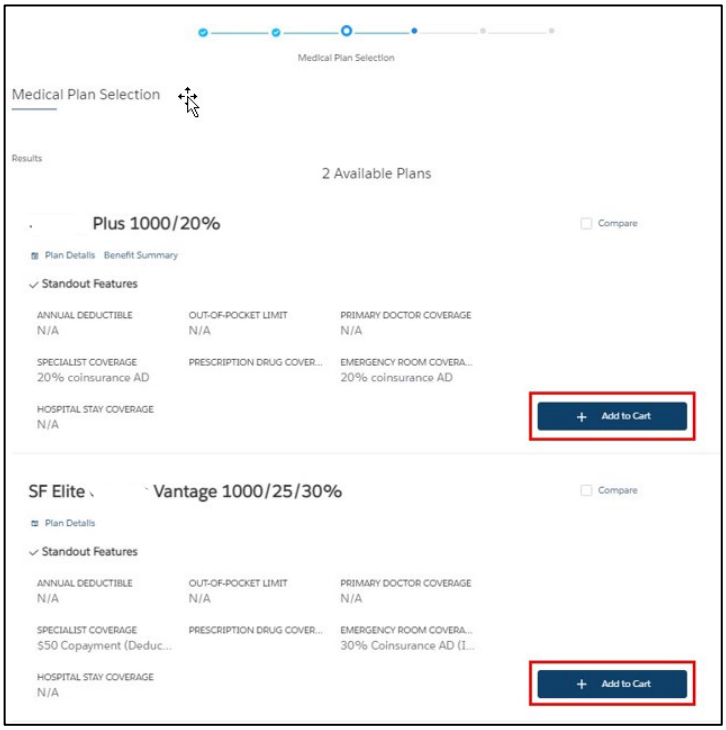
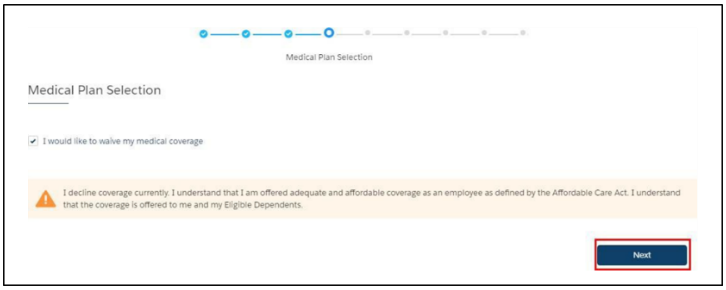
- Click **Start Open Enrollment,** or
- Click **Current Enrollment** if the employer is not in the open enrollment period



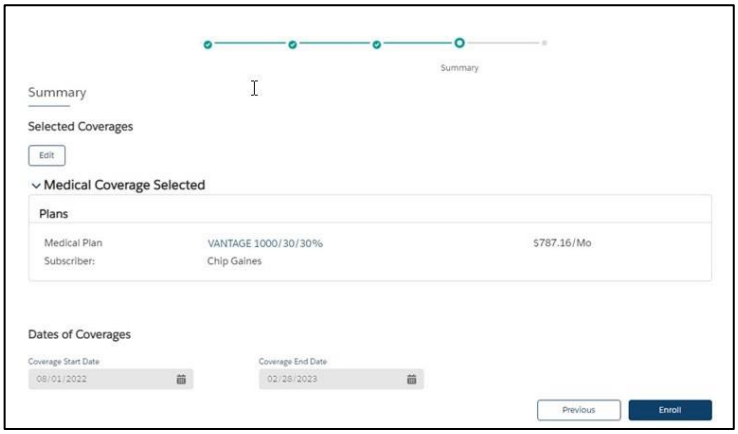
* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

Confirm that the information on the **Edit Member Demographics** screen is correct and click **Next.** Note: Once the information has been saved, you cannot edit the SSN or Effective Date. You must send an email request to e3_inquiries@sentara.com to have these fields changed.	
To add the Subscriber's dependents: 1. Click the box next to "**Do you want to add dependents**?" **If you don't want to add dependents, skip to step 4 by clicking **Next.*** 2. Provide the required information. • If different from the primary subscriber, please type in the address and select their correspondence preference from the dropdown menu (either **ID Card Only** or **All Correspondence**). • If the address is the same as the primary subscriber, click the box by **Address Same As Subscriber** 3. Click **Next.**	

* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

Select the plan by selecting **Add to Cart**. To remove a plan from the cart, hover over **Add to Cart**, and select **Remove.**	
If the member has elected to waive coverage, click the box accepting the confirmation statement and click **Next**.	

* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

On the Summary page you will have the opportunity to review the plan selection. • If you'd like to edit selections, click **Edit** at the top of the screen. Please note that selecting this option will lead you to the first election opportunity. • You may also click **Previous** to return to the previous screen. After reviewing, click **Enroll**.	
If all details have been updated successfully, you will receive a confirmation message on the next screen. Click **Finish.** You are returned to the **Member Demographic** page.	

Member Details Page

The Member Details page will allow you to:

- View member plan information
- Order ID Cards
- Update member demographics
- Process life events
- Terminate members
- Make corrections

To view/edit Member Details

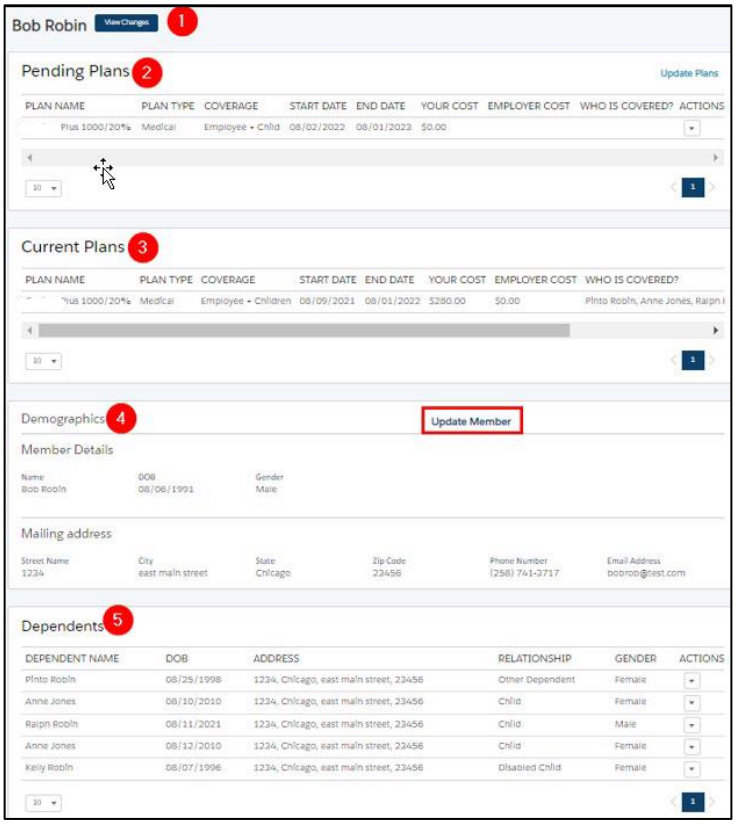
- Start on the Group Details page and scroll to the Members List at the bottom.

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

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

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

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



* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

Update Member

The option to make any updates to member can be found on the Member Details page by selecting the **Update Member** button.

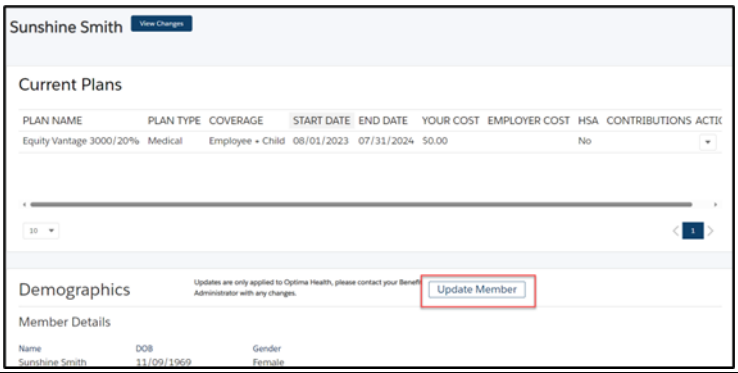
The Update Member button allows you to:

- update member demographics
- perform life events
- process terminations and corrections

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

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

On the Member Details page, select the **Update Member** button.

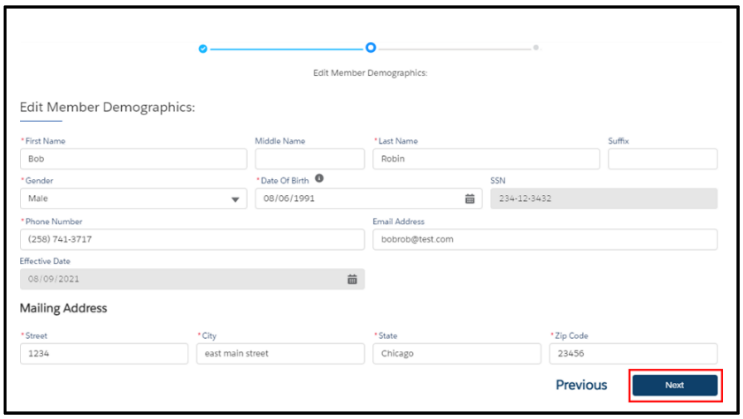


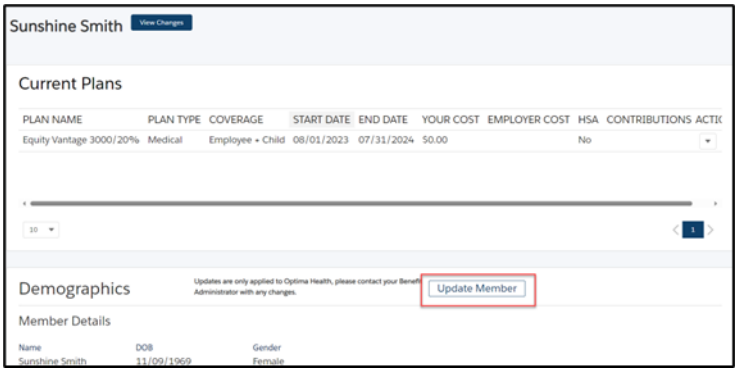
After clicking the **Update Member** button, a new window opens.

What would you like to do?

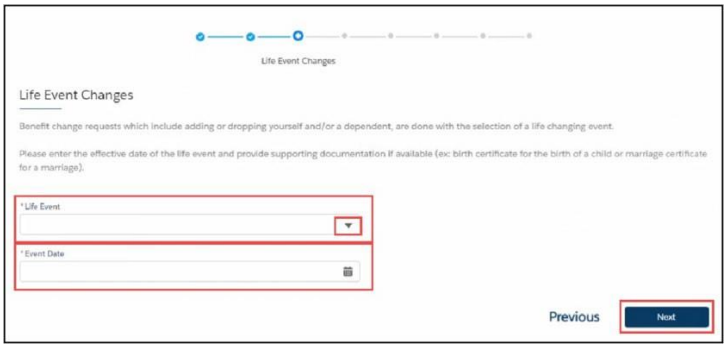
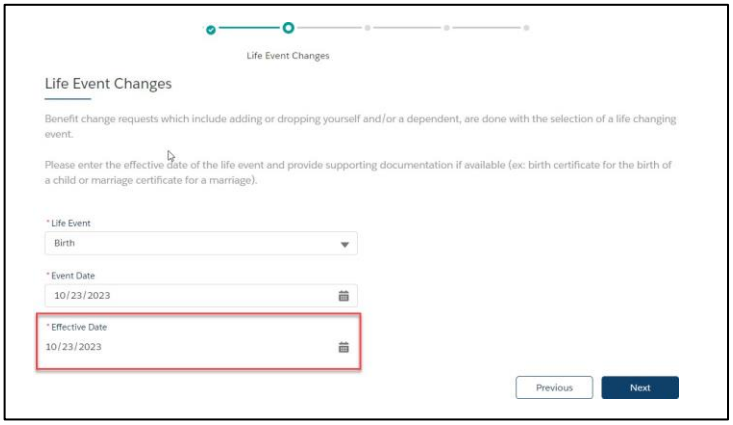
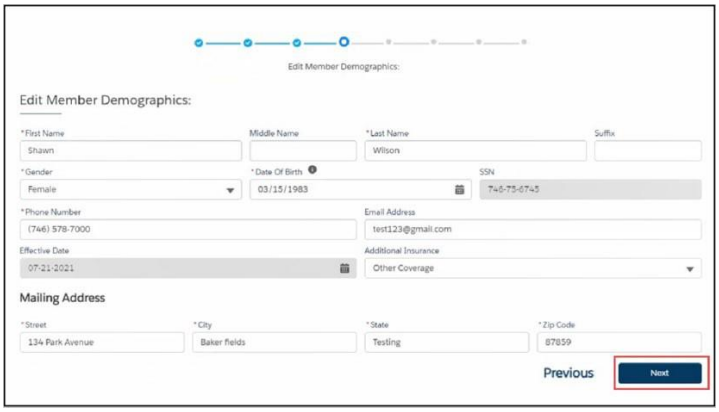
- Select **Update Member**
- Click **Next**

* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

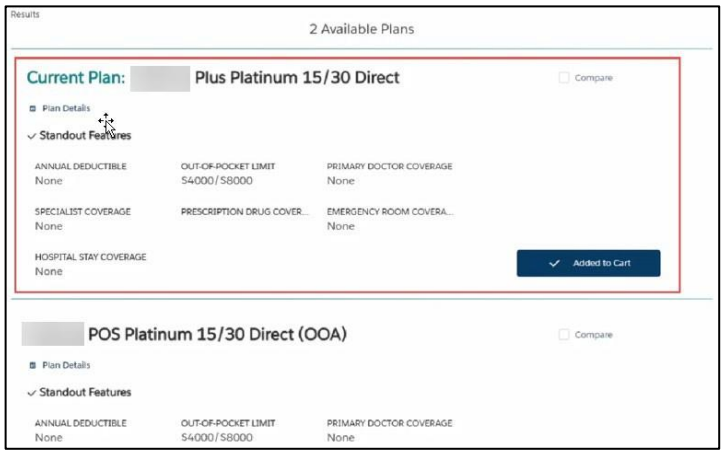
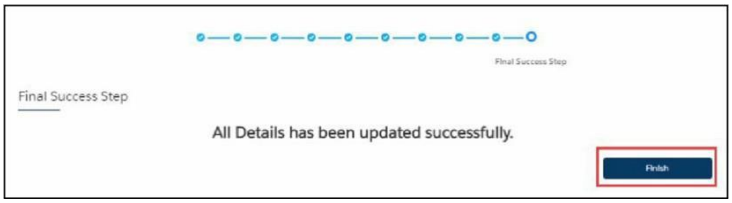
The **Edit Member Demographics** page displays. Editable member information is featured in white blocks on the screen. Grayed out blocks of information are not editable. Note: You cannot edit the SSN nor the Effective Date. You must send an email request to e3_inquiries@sentara.com to have these fields changed. Once you have completed your edits, click **Next**.	

Life Events	
Life events updates are made on the **Update Member** button on the Member Details page. Updates to **Life Events** will add or remove coverage for the member and/or their dependents, depending on the event selected. Examples of life events are: • Birth • Adoption • Divorce • Termination of all coverage	
On the **Member Demographics page** Click the **Update Member** button**.**	

* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

After clicking the **Update Member** button, a new window opens. What would you like to do? • Select **Life Event** • Click **Next**	
Select the applicable **Life Event** from the dropdown Enter the **Date of the Event**.	
After the **Life Event** and **Event Date** are entered; the **Effective Date** auto-populates. Click **Next**.	
Review member information and make edits as needed. Editable member information is featured in white blocks on the screen. Note: You cannot edit the SSN or the Effective Date. You must send an email request to e3_inquiries@sentara.com to have these fields changed. Once you have completed your edits, click **Next**.	

* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.

Review and update any relevant dependent information and click **Next.** • Select the desired plan • Click **Add to Cart**. Note: The member's current plan displays at the top above the other available plans.	
• If changes are needed, click **Edit**. • If the information and selections are correct, click **Enroll**.	
If all details have been updated successfully, you will receive a confirmation message on the next screen. Click **Finish.** You are returned to the **Member Demographic** page.	

We are your partner in Quoting and Enrollment success!

If you need additional assistance or would like to schedule a 1:1 virtual training session to enhance your understanding of the quoting and web enrollment tools, email the Sales Operations Training Team at thelearninghub@sentara.com.

* The content in this guide, including products and member details, is intended for instructional use only and does not reflect real individuals or actual plans.