

**Broker Portal Overview**  
**SentaraHealthPlans.com**

## Table of Contents

Purpose.....	4
Portal Security Overview.....	4
Public Access .....	4
Brokers Page .....	5
Broker Support.....	5
Secure Access.....	5
Secure Broker Portal - Sign In Instructions.....	7
Broker Portal Homepage.....	8
Navigation Menu and Section Details.....	9
Member.....	9
View Eligibility .....	9
Order Member ID Card.....	10
Manage Your Book, Quote & Enroll .....	11
Individual.....	11
Employer.....	11
Book of Business .....	12
Dashboard & Reporting.....	12
Group Reporting – Employer DataPoint .....	12
Commission .....	13
Activity .....	13
Information .....	13
Statement.....	14
Broker Rewards Program.....	14
Invoices & Overdue.....	15
Past Due Balances.....	15
Help & Support.....	16
Password Help .....	16

Device Management Portal .....	16
Need Help? — Quick Reference .....	17

## Purpose

The purpose of this Guide is to provide an overview of the tools and functions available on the SentaraHealthPlans.com broker portal for Brokers and Broker Administrators.

## Portal Security Overview

The Broker Portal is designed with multiple levels of security to protect sensitive information while still providing convenient access to commonly used resources.

Information and functionality depend on the level of data protection required and the type of action being performed:

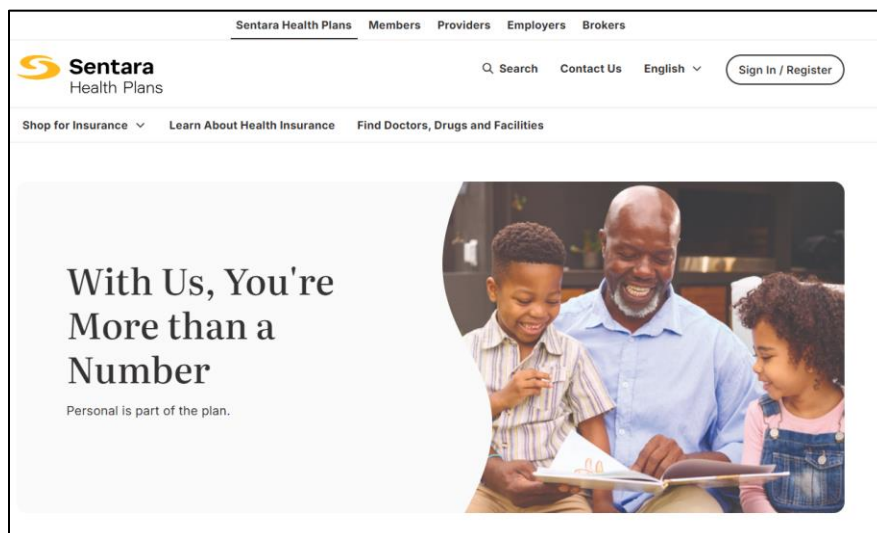
1. **Public Access**
2. **Secure Access**

---

## Public Access

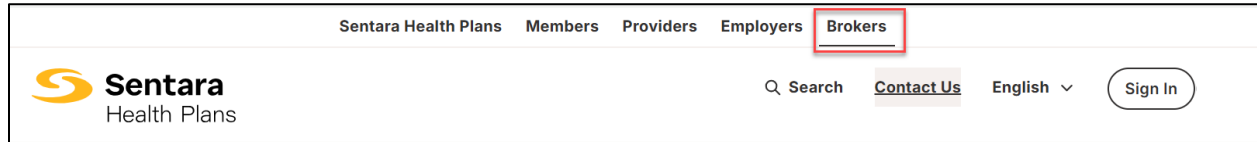
[www.sentarahealthplans.com](http://www.sentarahealthplans.com) - The **Sentara Health Plans Home Page** is the public-facing entry point for Brokers and Employers.

No login is required, making it ideal for quick access to high-level information and self-service resources.



## Brokers Page

The Sentara Health Plans Brokers page serves as a centralized hub for brokers to access general tools, resources, and support needed to successfully sell and manage Sentara Health Plans products.

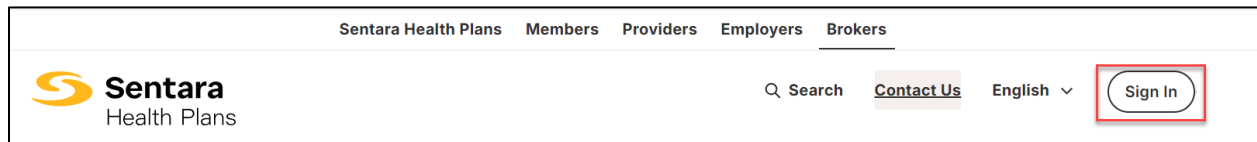


## Broker Support

Need help? The Broker Support page contains helpful contact information, and links to other helpful tools and resources.

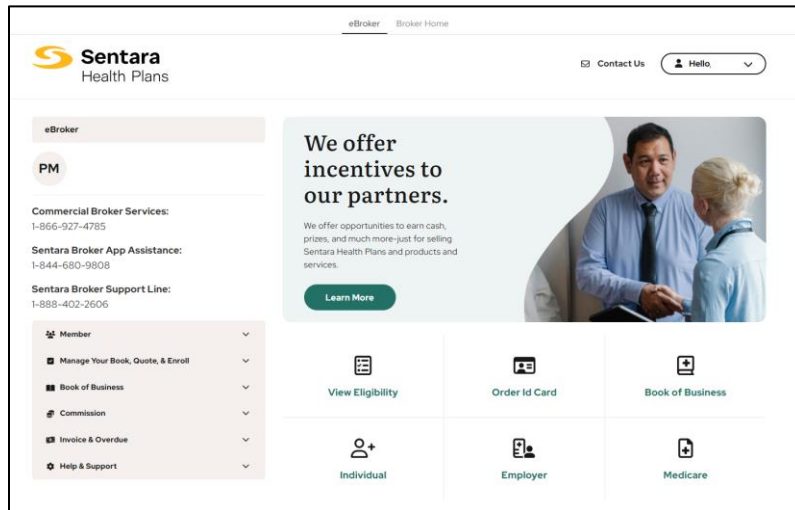
## Secure Access

The Broker Portal's secure workspace is designed for managing an active book of business and serves as the central hub for Broker's operational tasks such as account management, servicing existing groups, and monitoring compensation-related activity. It contains private, client and group information.



Secure access allows brokers and broker administrators to:

- view member eligibility
- access links to quoting and enrollment tools
- track broker rewards and commissions
- request or order ID cards.



**Access to the portal requires:**

- Username and Password
- Multi-factor authentication (MFA) using **Microsoft Authenticator**.

**⚠ IMPORTANT**

Sentara Health Plans now uses Microsoft Authenticator to provide an added layer of security when signing into the secure Broker Portal. This verification step helps protect your account and ensures that only authorized users can access group information.

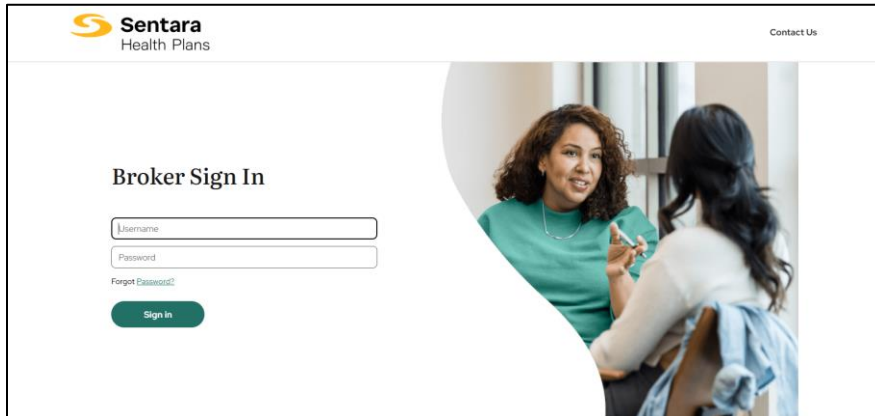
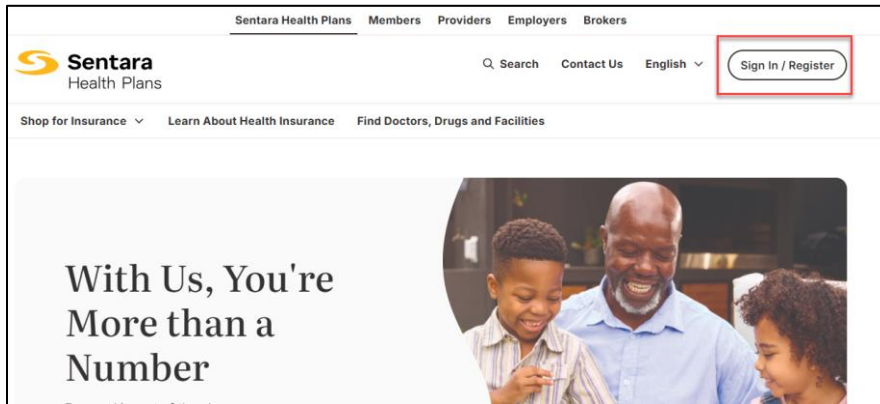
**\*A one-time set up is required for you to enroll in Microsoft Authenticator.**

If you need instructions on how to install Microsoft Authenticator, please visit [www.sentarahealthplans.com/needtoknow](http://www.sentarahealthplans.com/needtoknow) for the User Guide.

## Secure Broker Portal - Sign In Instructions

To access the secure Broker Portal, follow the steps below:

1. Go to [www.sentarahealthplans.com](http://www.sentarahealthplans.com)
2. Select Sign In
3. Select Brokers
4. Enter your username and password
5. Complete the Microsoft Authenticator verification (as described above)

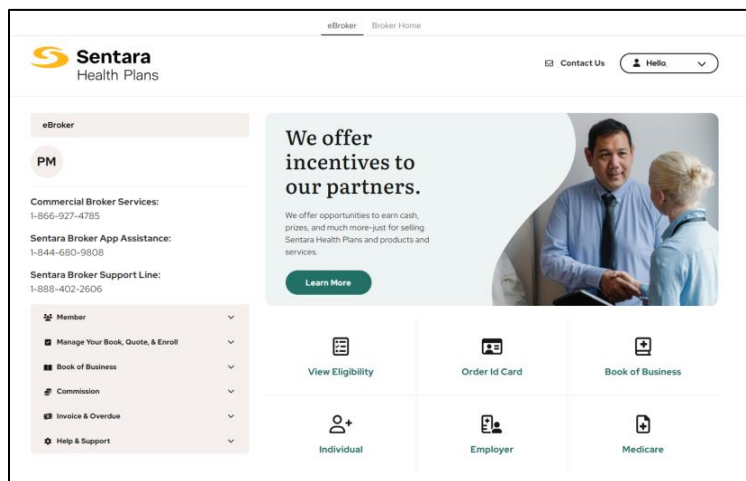


## Broker Portal Homepage

Once you have completed the login and authentication process, the secure **Broker Portal** is displayed.

Within the secure portal, Brokers can:

- view member eligibility
- access links to quoting and enrollment tools
- track broker rewards and commissions
- request or order ID cards

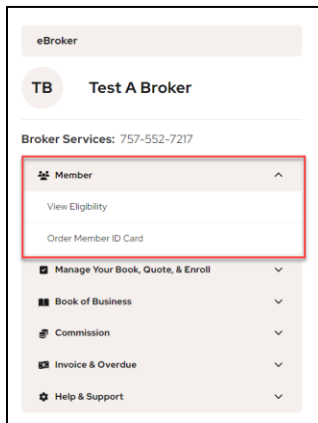


## Navigation Menu and Section Details

The Navigation menu on the left side of the screen provides access to different tools and tasks on the portal. Items are also available by clicking on the tiles in the page.

The Menu Sections expand and collapse by clicking the arrow and are broken into the following sections:

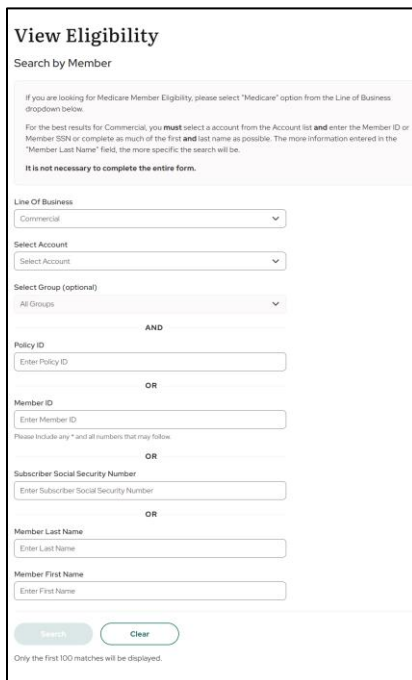
### Member



The screenshot shows the eBroker navigation menu. At the top, it says "eBroker" and "TB Test A Broker". Below that, it lists "Broker Services: 757-552-7217". The "Member" section is highlighted with a red box and contains the following options: "View Eligibility", "Order Member ID Card", "Manage Your Book, Quote, & Enroll", "Book of Business", "Commission", "Invoice & Overdue", and "Help & Support".

For both of these sections, elect a group from the Group Number list and enter the Member ID or Member SSN or complete as much of the first and last name as possible.

### View Eligibility



The screenshot shows the "View Eligibility" search form. It includes a "Search by Member" section with instructions: "If you are looking for Medicare Member Eligibility, please select 'Medicare' option from the Line of Business dropdown below." and "For the best results for Commercial, you must select an account from the Account list and enter the Member ID or Member SSN or complete as much of the first and last name as possible. The more information entered in the 'Member Last Name' field, the more specific the search will be." Below the instructions, there are several input fields: "Line Of Business" (dropdown menu), "Select Account" (dropdown menu), "Select Group (optional)" (dropdown menu), "Policy ID" (text input), "Member ID" (text input), "Subscriber Social Security Number" (text input), "Member Last Name" (text input), and "Member First Name" (text input). There are "Search" and "Clear" buttons at the bottom. A note at the bottom states: "Only the first 100 matches will be displayed."

## Order Member ID Card

For new members, please allow 24 – 48 hours before the Member ID Card information is available for viewing in the portal. If an emergency card is required, please contact your sales representative.

### Order Member ID Card

**Enter Search Information**

If you are looking to access Order ID Card for Medicare Members, please select "Medicare" option from the Line of Business dropdown below.

For the best results for Commercial, you **must** select an account from the Account list **and** enter the Member ID or Member SSN or complete as much of the first **and** last name as possible. The more information entered in the "Member Last Name" field, the more specific the search will be.

**It is not necessary to complete the entire form.**

You can only request a card for active members who are enrolled with Sentara Health Plans through your company.  
You can only request a card if one has not been issued in the past 30 days.

Line of Business

Select Account

Select Group (optional)

**AND**

Subscriber ID  
  
Please include any "\*" and all numbers that may follow.

**OR**

Subscriber Social Security Number

**OR**

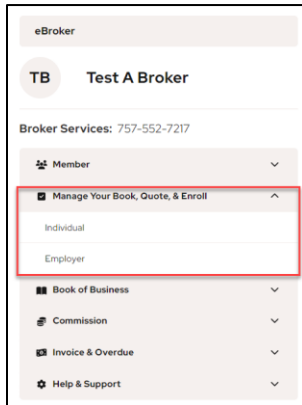
Subscriber Last Name

Subscriber First Name

Display all members enrolled through the selected group(s) if number enrolled is 100 or less.

Only the first 100 matches will be displayed.

## Manage Your Book, Quote & Enroll



### Individual

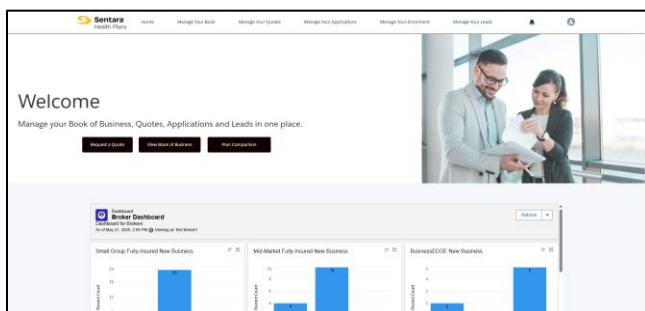
If you sell Individual Product Plans, here you can manage new and renewing quotes, and your communication preferences.



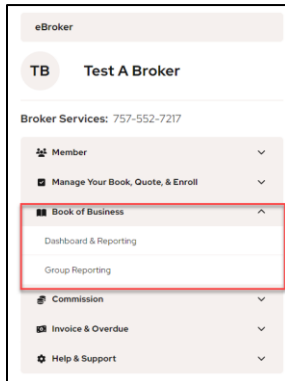
### Employer

The **Employer** link connects to the Commercial Employer **Quoting and e3 Web Enrollment Platform**. From here brokers and broker administrators can:

- Create and manage Small Group, Mid-Market, and BusinessEDGE new and renewal sales quotes for Employer Groups.
- Manage e3 Web enrollment for enrolled Employer Groups.
- *\*Additional login credentials are required.*

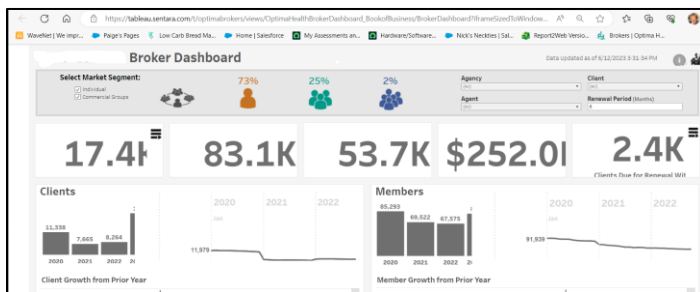


## Book of Business



## Dashboard & Reporting

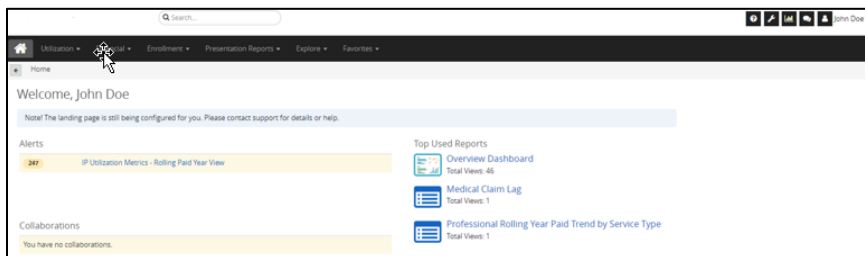
This interactive tool allows you to view your entire book of business or can be filtered by Market Segment or Product. From the dashboard, you can view a list of your clients and member growth from a prior year.



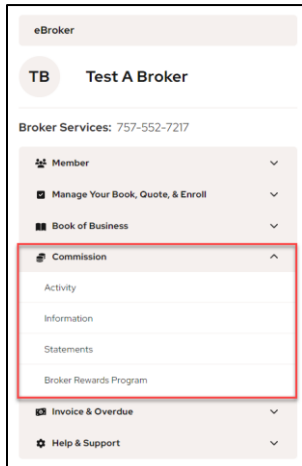
## Group Reporting – Employer DataPoint

Depending on the size of the group, you may have access to this employer group reporting tool that provides access to the latest data, generates reports and a customizable personal reporting dashboard.

Within this tool, you are equipped with a learning library that offers multi-level training resources on the reporting tool also available at [www.sentarahealthplans.com/needtoknow](http://www.sentarahealthplans.com/needtoknow).



## Commission



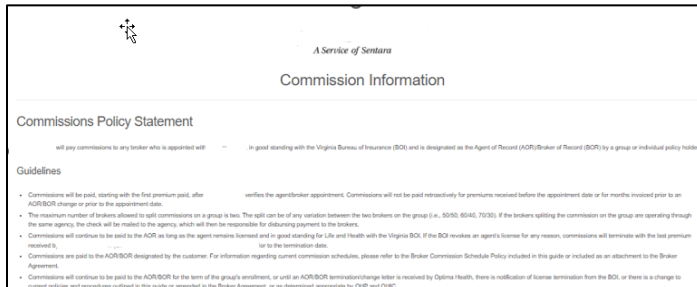
## Activity

This interactive tool allows you to view your recent commission paid amounts as well as two years historical. Your dashboard shows yearly commissions paid to date your quarterly commission trend.



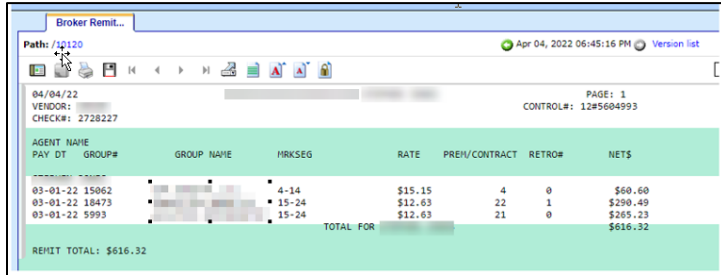
## Information

Here you can view the current commission policy statement and guidelines.



## Statement

This tool provides access to view your remit that accompanies your commission payment. Please note you will need to be signed up for Electronic Funds Transfer (EFT) to view these statements.



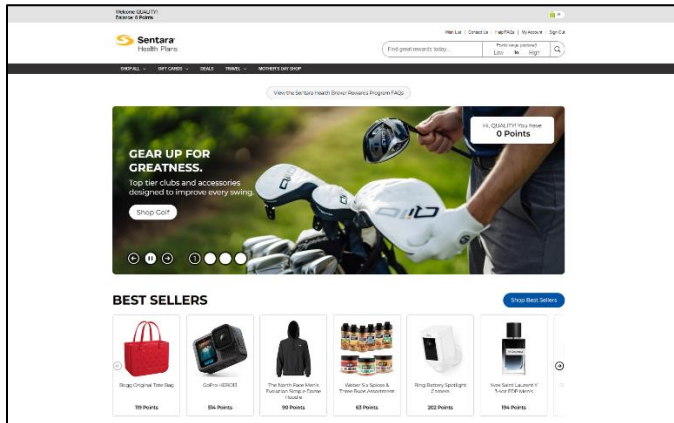
Path: /10120  
Apr 04, 2022 06:45:16 PM Version list

04/04/22 PAGE: 1  
VENDOR: CONTROL#: 1245604993  
CHECK#: 2728227

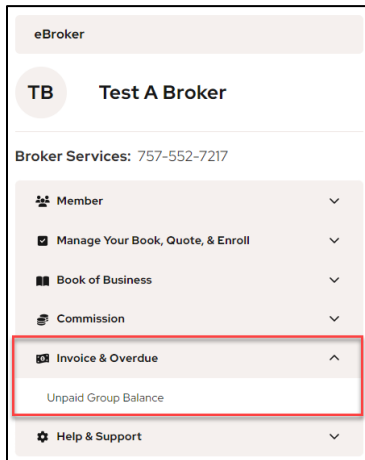
AGENT NAME	PAY DT	GROUP#	GROUP NAME	HRKSEG	RATE	PREH/CONTRACT	RETROW	NET\$
	03-01-22	15062		4-14	\$15.15	4	0	\$60.60
	03-01-22	18473		15-24	\$12.63	22	1	\$290.49
	03-01-22	5993		15-24	\$12.63	21	0	\$265.23
TOTAL FOR								\$616.32
REMIT TOTAL: \$616.32								

## Broker Rewards Program

You can earn points for selling Sentara Health Plans business. Points may be redeemed for name-brand merchandise, gift cards, and travel. Be sure to opt in to access your rewards!



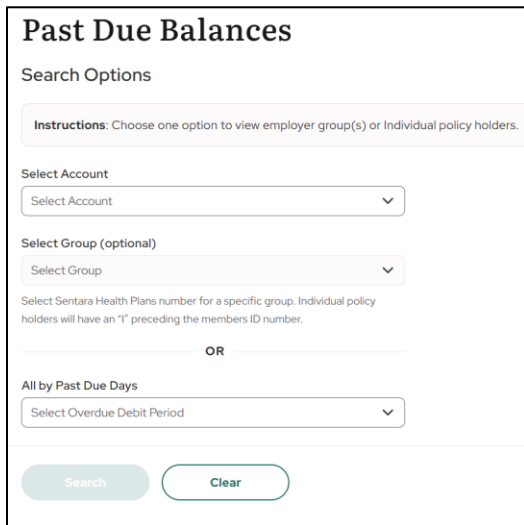
## Invoices & Overdue



The screenshot shows the eBroker interface. At the top, it says "eBroker" and "TB Test A Broker". Below that, "Broker Services: 757-552-7217" is listed. A list of services follows: "Member", "Manage Your Book, Quote, & Enroll", "Book of Business", "Commission", "Invoice & Overdue", and "Help & Support". The "Invoice & Overdue" option is highlighted with a red border and has an upward-pointing arrow next to it. Below this option, the text "Unpaid Group Balance" is visible.

## Past Due Balances

Here you can choose the option to view employer group(s) or individual policy holders past due invoices.

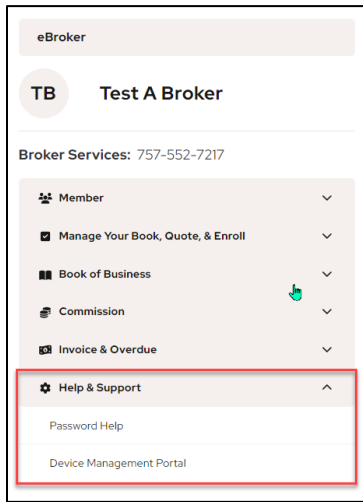


The screenshot shows the "Past Due Balances" search form. It has a "Search Options" section with the following fields and instructions:

- Instructions:** Choose one option to view employer group(s) or Individual policy holders.
- Select Account:** A dropdown menu with "Select Account" as the placeholder.
- Select Group (optional):** A dropdown menu with "Select Group" as the placeholder.
- OR**
- All by Past Due Days:** A dropdown menu with "Select Overdue Debit Period" as the placeholder.

At the bottom of the form, there are two buttons: "Search" and "Clear".

## Help & Support



### Password Help

**Password Help** allows authorized users to securely manage access to their accounts by resetting their portal password directly within the secure Portal. This self-service option eliminates the need to contact support and helps you quickly regain access if a password is forgotten or expired.

 Please take a moment to **enroll in Password Management** using the link available on the website.

### Device Management Portal

The **Device Management Portal** permits users to add and remove authentication devices or configure options for their devices without needing to contact support staff for help. You will know that your changes were successful when the final "Saved" button is grayed out and no longer clickable.

## Need Help? — Quick Reference

### Portal & Password Assistance

Email: [brokerserices@sentara.com](mailto:brokerserices@sentara.com)

Phone: (757) 552-7217 or 1-888-927-4785

### Broker Portal Access Requests

Email: [brokerrelations@sentara.com](mailto:brokerrelations@sentara.com)

### Microsoft Authenticator Support

Phone: 757-857-8190 or 855-306-2252 (Option 6)

### Commissions Questions

Email: [brokerinquirymailbox@sentara.com](mailto:brokerinquirymailbox@sentara.com)

### Broker User Guides and Training Support

Visit: [www.sentarahealthplans.com/needtoknow](http://www.sentarahealthplans.com/needtoknow)

Email: [TheLearningHub@sentara.com](mailto:TheLearningHub@sentara.com)

### Broker Resources and Forms

Visit: [www.sentarahealthplans.com/en/brokers/broker-support](http://www.sentarahealthplans.com/en/brokers/broker-support)