# Broker Portal Overview

# SentaraHealthPlans.com

Sentara Health Plans

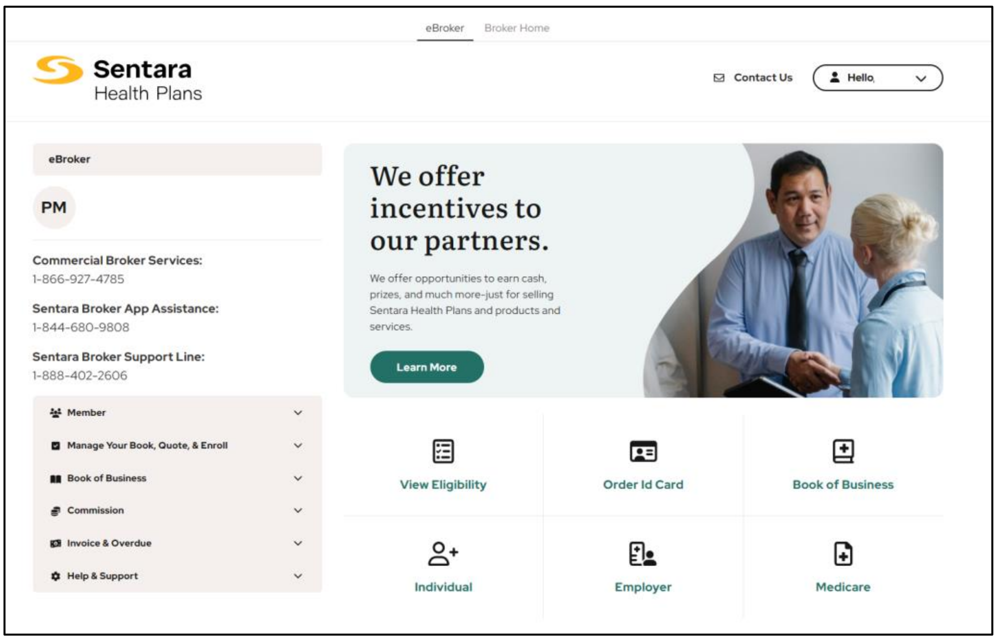
## Contents

# Purpose

The purpose of this User Guide is to provide an overview of the tools and functions available on the broker portal.

Brokers have 24/7 access to all of the information and sales resources necessary to be successful. Our online portal gives brokers flexibility in working with us and serving clients, for every line of business. Brokers can request quotes, manage their groups, complete renewals, and view report activity.

Brokers must have a User Name and Password to access this page and is sometimes referred to as the Secure Portal, or eBroker.




On **eBroker** the broker can:

- Enroll in Self-service Password reset
- View Eligibility
- Order ID card
- Manage Your Book, Quote and Enroll (Salesforce and e3 Web Enrollment)
  ** Additional Log in and permission is required to access*
- Review Dashboard and Reporting information
- View Commission information
- View Broker Rewards Program
- View Invoices

## Self-service Password Reset

With the implementation of Self-service password reset, Brokers are required to enroll in Password Reset Enrollment. Please click on the link located in eBroker to enroll.

## Member

### View Eligibility

For the best results you must select 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.

### Order Member ID Card

For the best results you must select 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.

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

## Manage Your Book, Quote and Enroll

1. Individual
2. Employer
3. Medicare

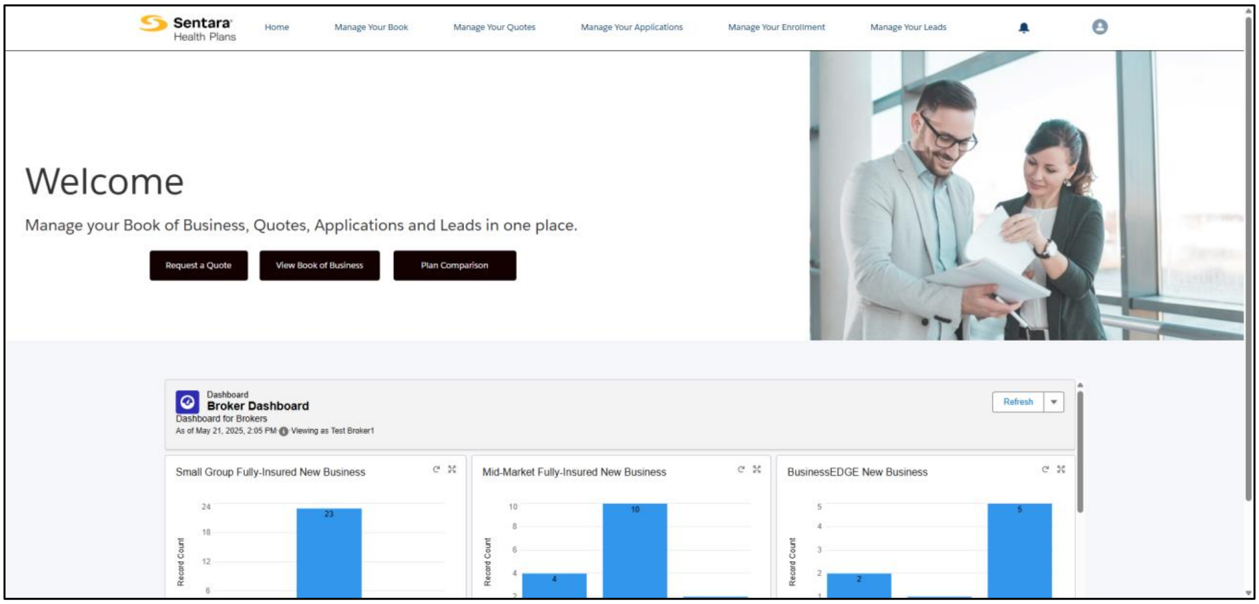
### Individual - New & Renewing

If you sell Individual Product Plans, here you can request quotes for your clients and manage your communication preferences.

## Employer – Quoting and Web Enrollment Home Page

- **Request a Quote** – Create a new sale quote.
- **Renewal Quotes** – Manage renewal quotes.
- **e3 Web Enrollment** - If you manage the enrollment for your group, here you are able to view and make changes to member enrollment. *Additional Log in and permission is required to access*

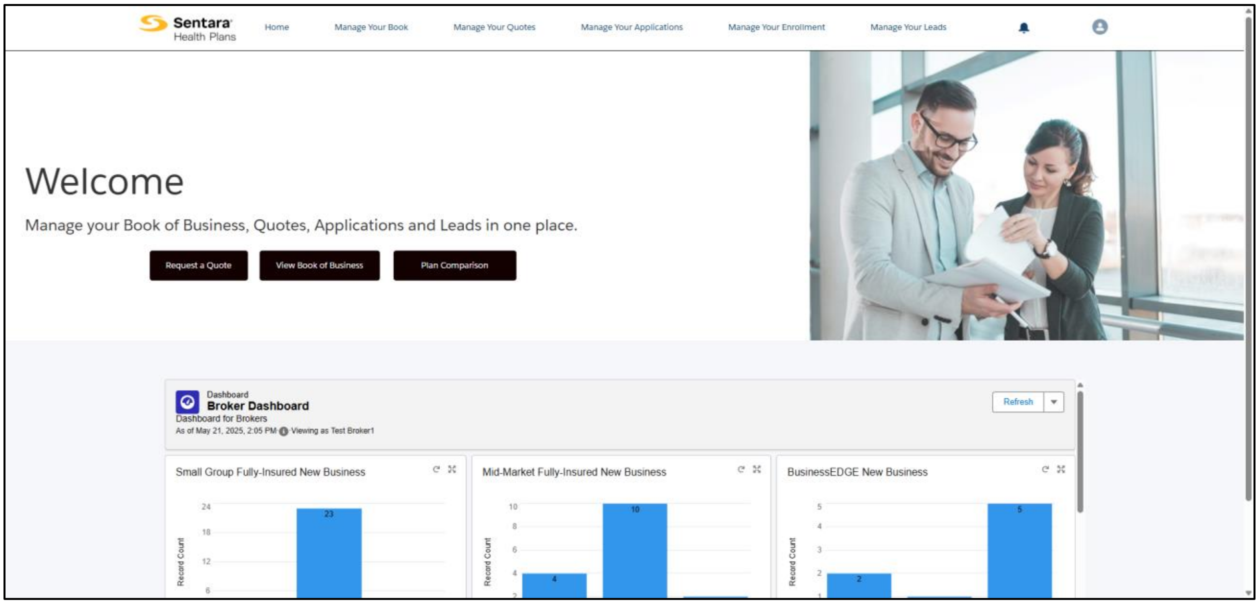
For instructions on Quoting and Web Enrollment, please see the appropriate User Guides.



## Medicare

If you sell Medicare, you can Request a Quote and manage various tasks for your Book of Business.

For User Guides specific to Medicare Quoting, please see the User Guides available on the Medicare Plans Page - sentarahealthplans.com/en/brokers/medicare-plans



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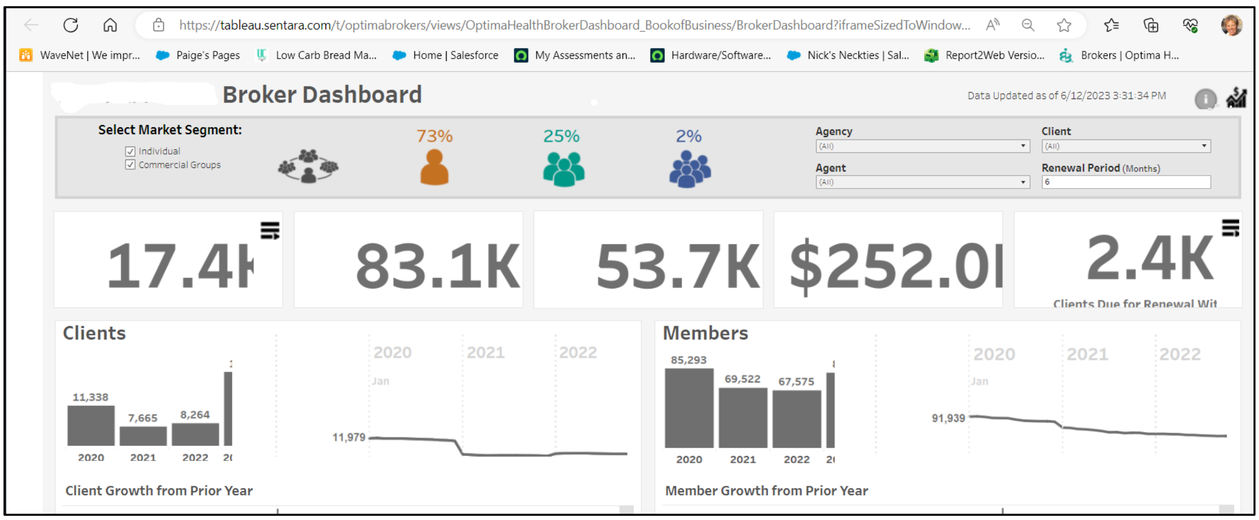
# Book of Business

## Dashboard & Reporting

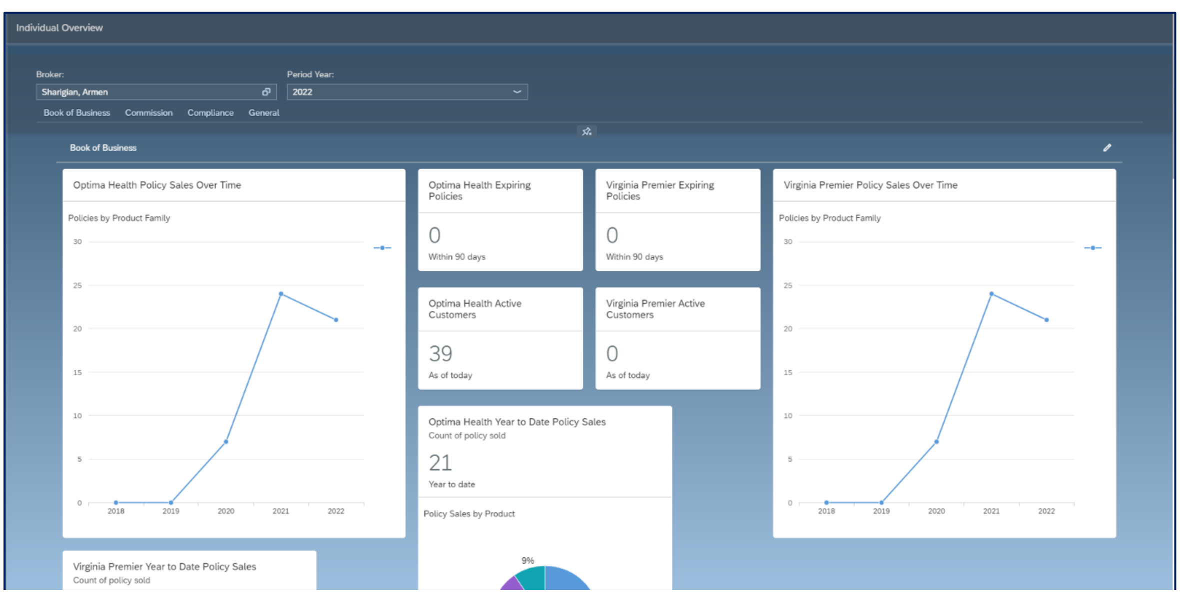
This interactive tool allows you to view your entire book of business or can be filtered by Market Segment or Product.

From the dashboard, you can view a list of your clients and member growth from a prior year.




## Medicare

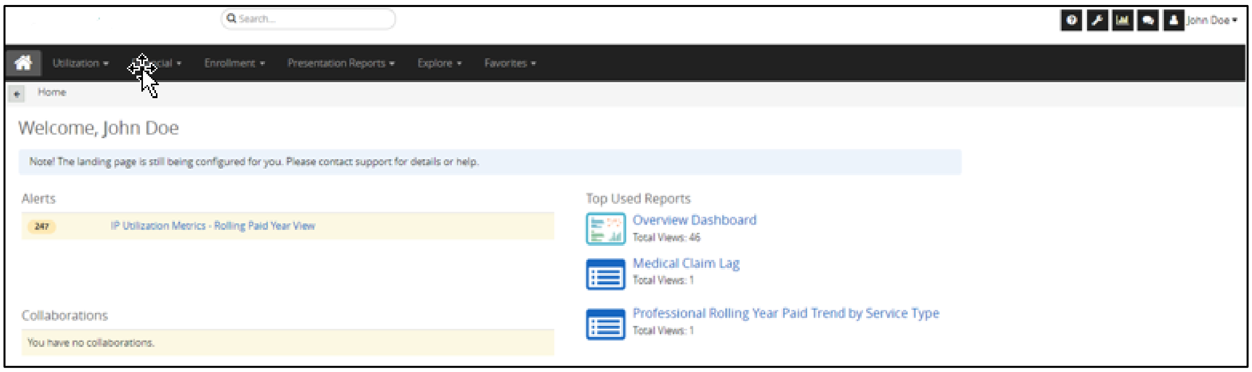
Here you can view your sold Medicare policies.



## 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.



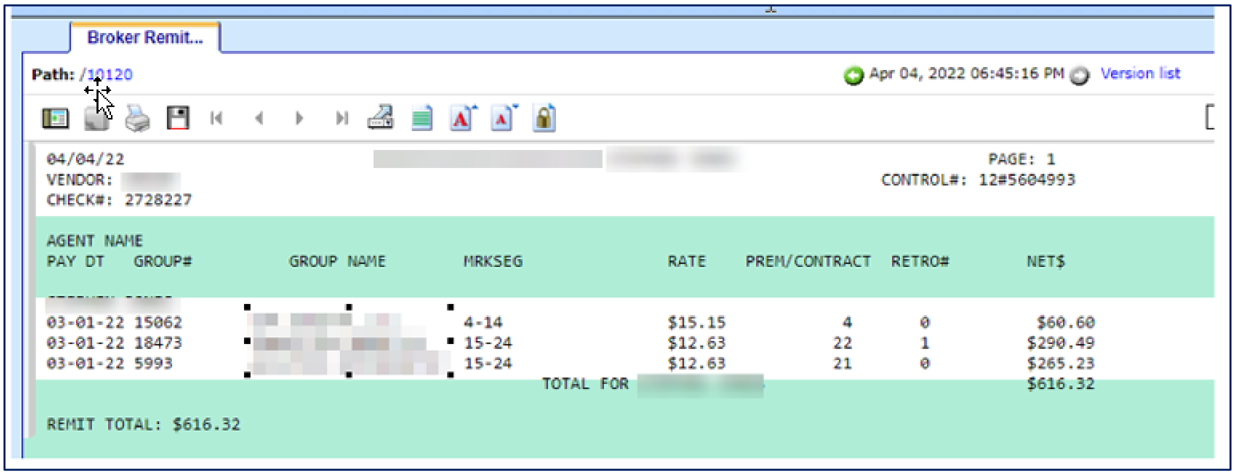
# Commission

## Commercial 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.


## Commissions 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.



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### Information

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

*A Service of Sentara*

Commission Information

Commissions Policy Statement

will pay commissions to any broker who is appointed with , in good standing with the Virginia Bureau of Insurance (BOI) and is designated as the Agent of Record (AOR)/Broker of Record (BOR) by a group or individual policy holder.

Guidelines

- Commissions will be paid, starting with the first premium paid, after verifies the agent/broker appointment. Commissions will not be paid retroactively for premiums received before the appointment date or for months invoiced prior to an AOR/BOR change or prior to the appointment date.
- The maximum number of brokers allowed to split commissions on a group is two. The split can be of any variation between the two brokers on the group (i.e., 50/50; 60/40, 70/30). If the brokers splitting the commission on the group are operating through the same agency, the check will be mailed to the agency, which will then be responsible for disbursing payment to the brokers.
- Commissions will continue to be paid to the AOR as long as the agent remains licensed and in good standing for Life and Health with the Virginia BOI. If the BOI revokes an agent's license for any reason, commissions will terminate with the last premium received b ior to the termination date.
- Commissions are paid to the AOR/BOR designated by the customer. For information regarding current commission schedules, please refer to the Broker Commission Schedule Policy included in this guide or included as an attachment to the Broker Agreement.
- Commissions will continue to be paid to the AOR/BOR for the term of the group's enrollment, or until an AOR/BOR termination/change letter is received by Optima Health, there is notification of license termination from the BOI, or there is a change to current policies and procedures outlined in this guide or amended in the Broker Agreement, or as determined appropriate by OHP and OHIC.

### Broker Rewards Program

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

## Invoices & Overdue

### Past Due Balances

View employer group(s) or individual policy holders.

## Help & Support

### Password Help

### Device Management Portal

The Sentara Health Plans 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.