Sentara Health Plans

Broker Portal Overview
SentaraHealthPlans.com

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Sentara
Health Plans

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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**

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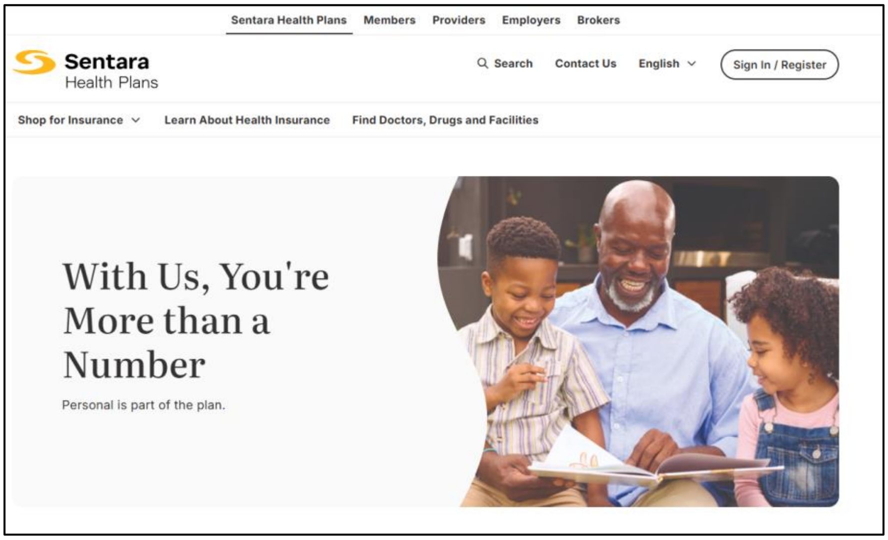
Public Access

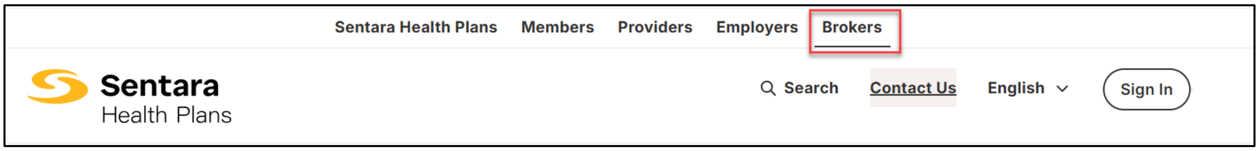
www.sentarahealthplans.com - The **Sentara Health Plans Home Page** is the public-facing entry point for Brokers and Employers.

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.

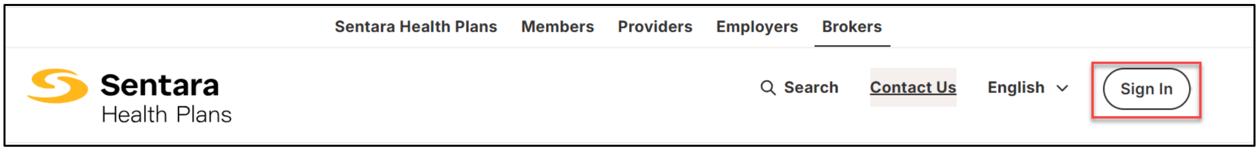


Broker Support

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.

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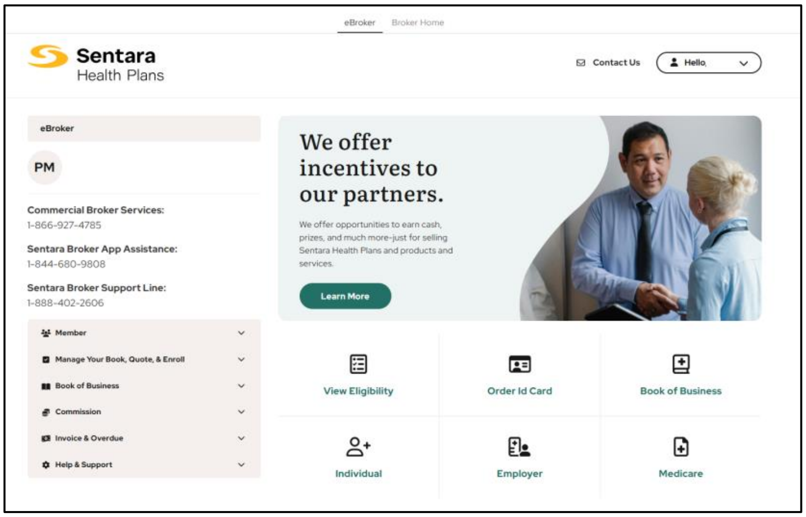


Access to the portal requires:

- 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.

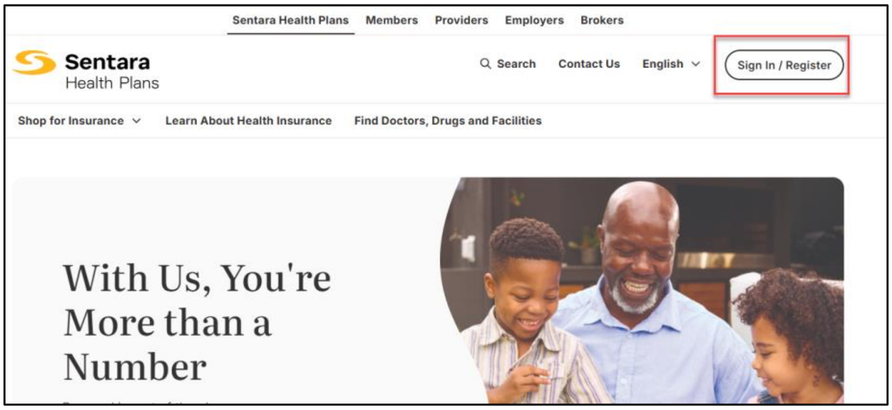
***A one-time set up is required for you to enroll in Microsoft Authenticator**.

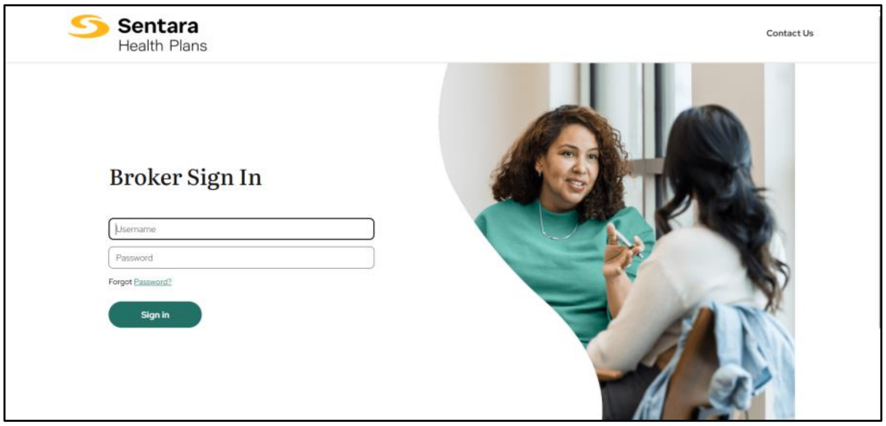
If you need instructions on how to install Microsoft Authenticator, please visit www.sentarahealthplans.com/needtoknow for the User Guide.

Secure Broker Portal - Sign In Instructions

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

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



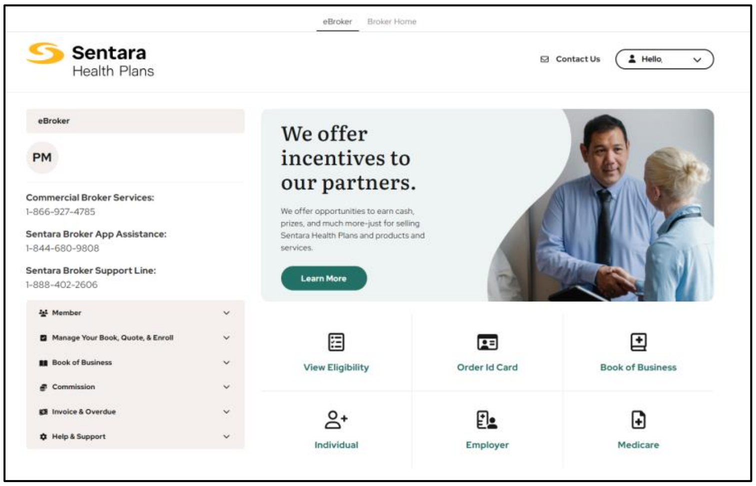


Broker Portal Homepage

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



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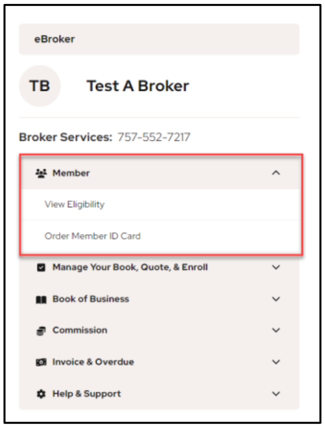
Navigation Menu and Section Details

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.

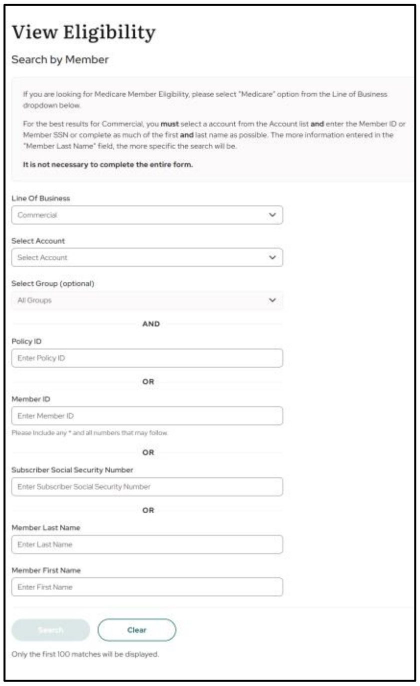
The Menu Sections expand and collapse by clicking the arrow and are broken into the following sections:

Member



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



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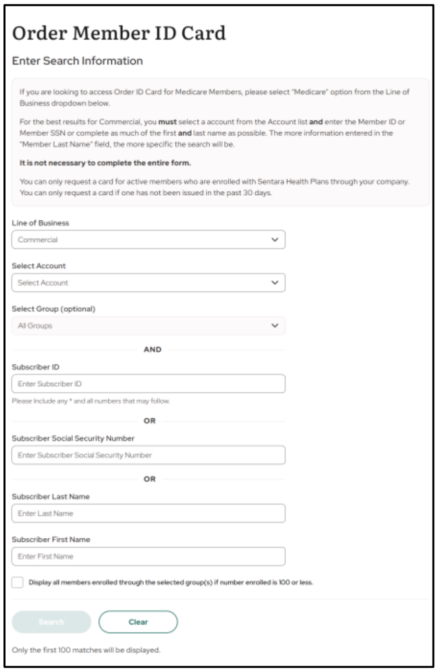
Order Member ID Card

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.



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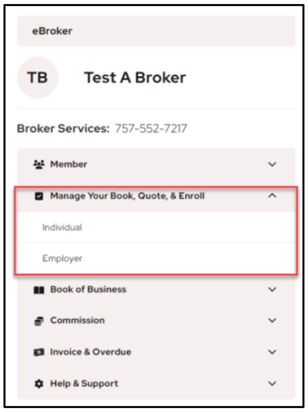
Manage Your Book, Quote & Enroll



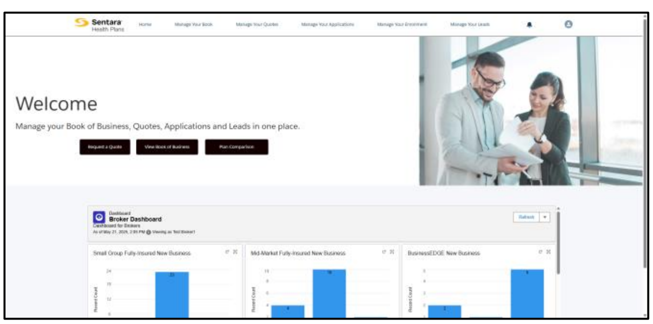
Individual

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*.



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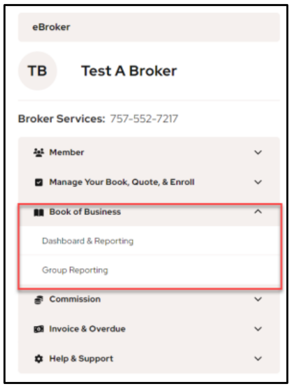
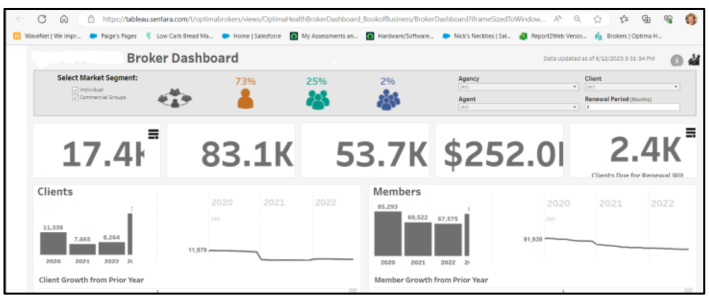
Book of Business



Dashboard & Reporting

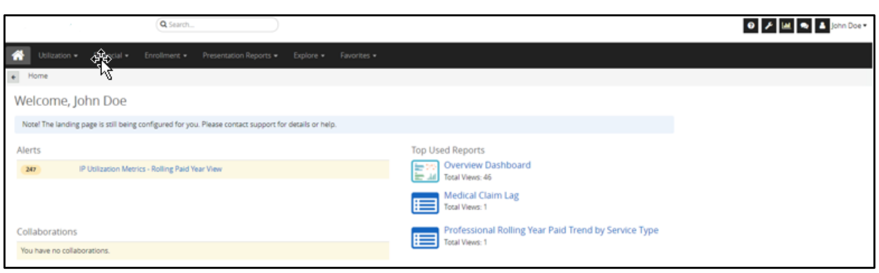
This interactive tool allows you to view your entire book of business or can be filtered by Market Segment or Product. From the dashboard, you can view a list of your clients and member growth from a prior year.



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.



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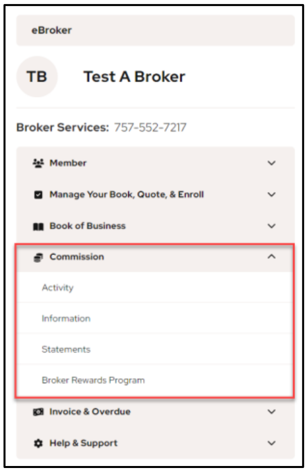
Commission

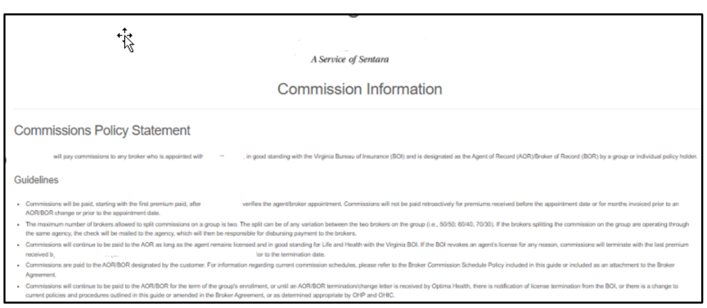


Activity

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.

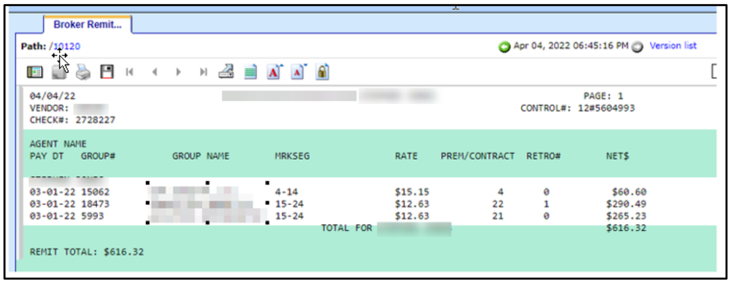
Information

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



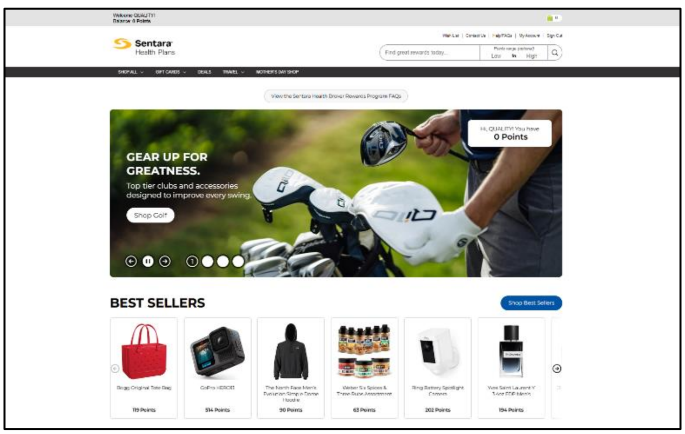
Statement

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.

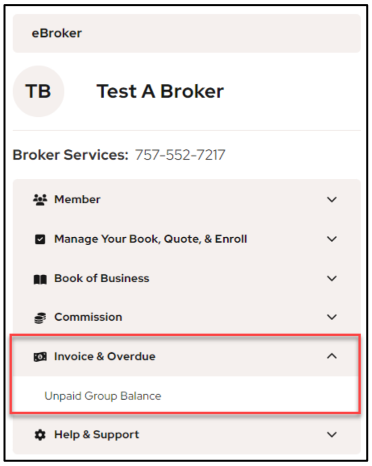


Broker Rewards Program

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!

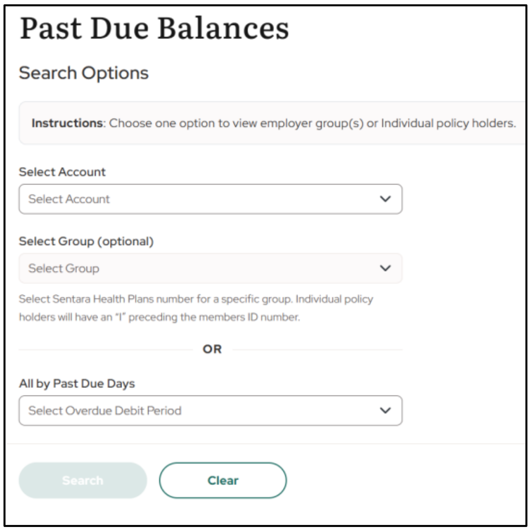


Invoices & Overdue

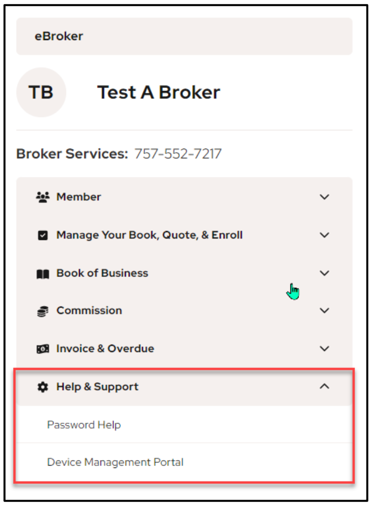


Past Due Balances

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



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.

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Need Help? — Quick Reference

Portal & Password Assistance
Email: brokerserices@sentara.com
Phone: (757) 552-7217 or 1-888-927-4785

Broker Portal Access Requests
Email: brokerrelations@sentara.com

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

Commissions Questions
Email: brokerinquirymailbox@sentara.com

Broker User Guides and Training Support
Visit: www.sentarahealthplans.com/needtoknow
Email: TheLearningHub@sentara.com

Broker Resources and Forms
Visit: www.sentarahealthplans.com/en/brokers/broker-support