Broker Portal Overview

sentarahealthplans.com

Revised 11/2023

Sentara Health Plans

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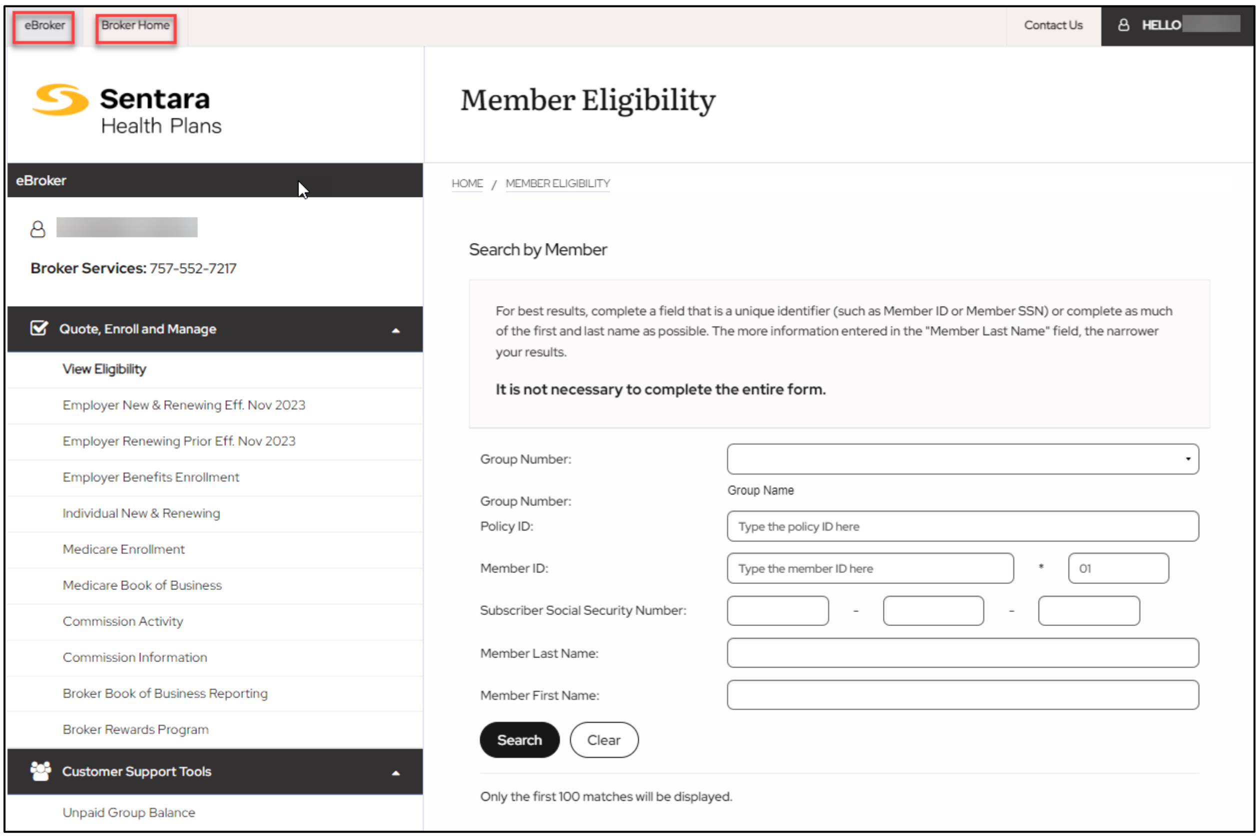
Purpose

The purpose of this User Guide is to provide an overview of the tools and functions available to you once you log on to the secure side of your broker portal.



Sentara Health Plans

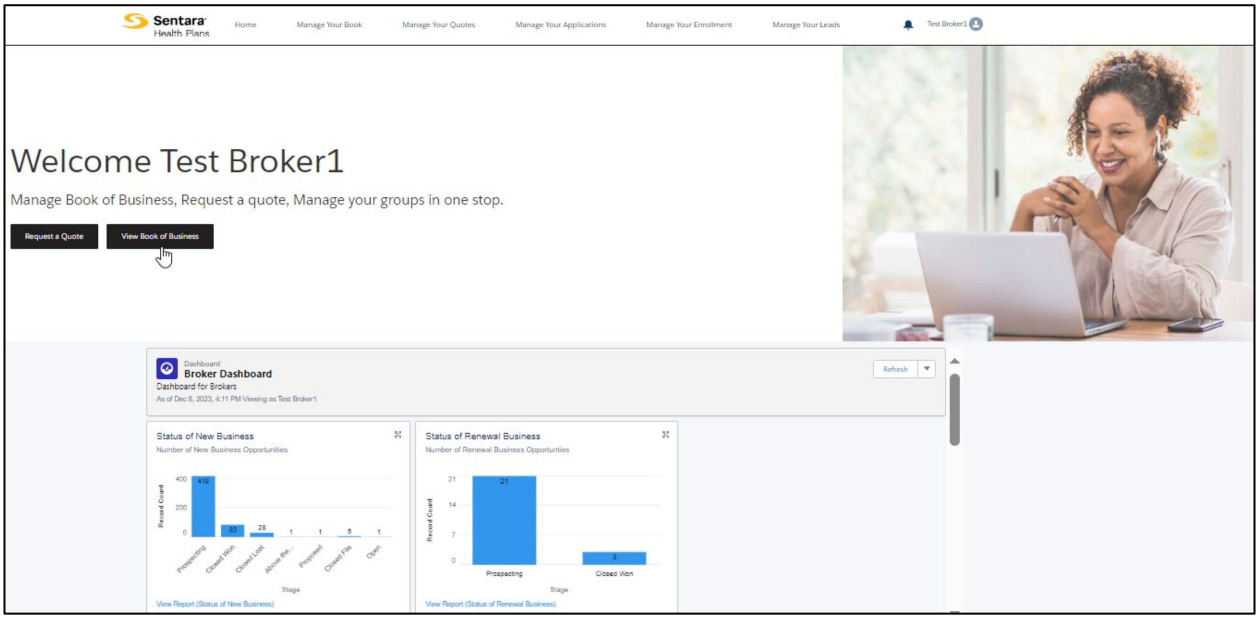
Your Homepage

From your eBroker homepage, you can perform the following actions:

1. Employer New Business
2. Employer Renewals
3. Employer Benefits Enrollment (e3 Web Enrollment)
4. Individual New & Renewing
5. Medicare Enrollment
6. Medicare Book of Business
7. Commission Activity
8. Commission Information
9. Employer Group Reporting (DataPoint)
10. Broker Book of Business
11. Broker Rewards Program

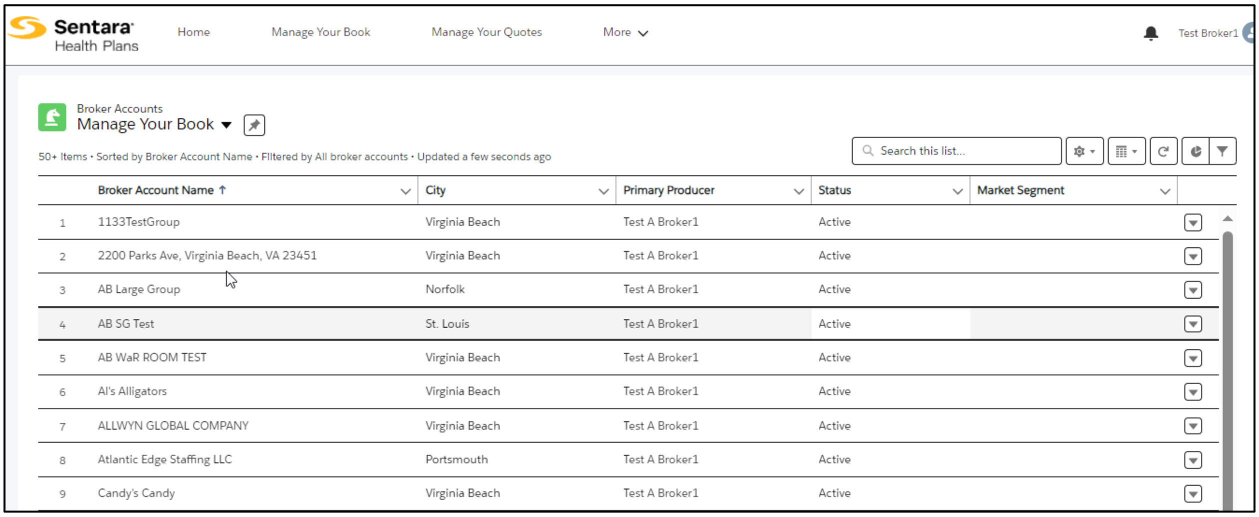
Employer New Business

If you sell Employer Business, here you can request a new business quote starting April 10, 2023, track the status of your quote, and view your book of business.



Employer Renewals

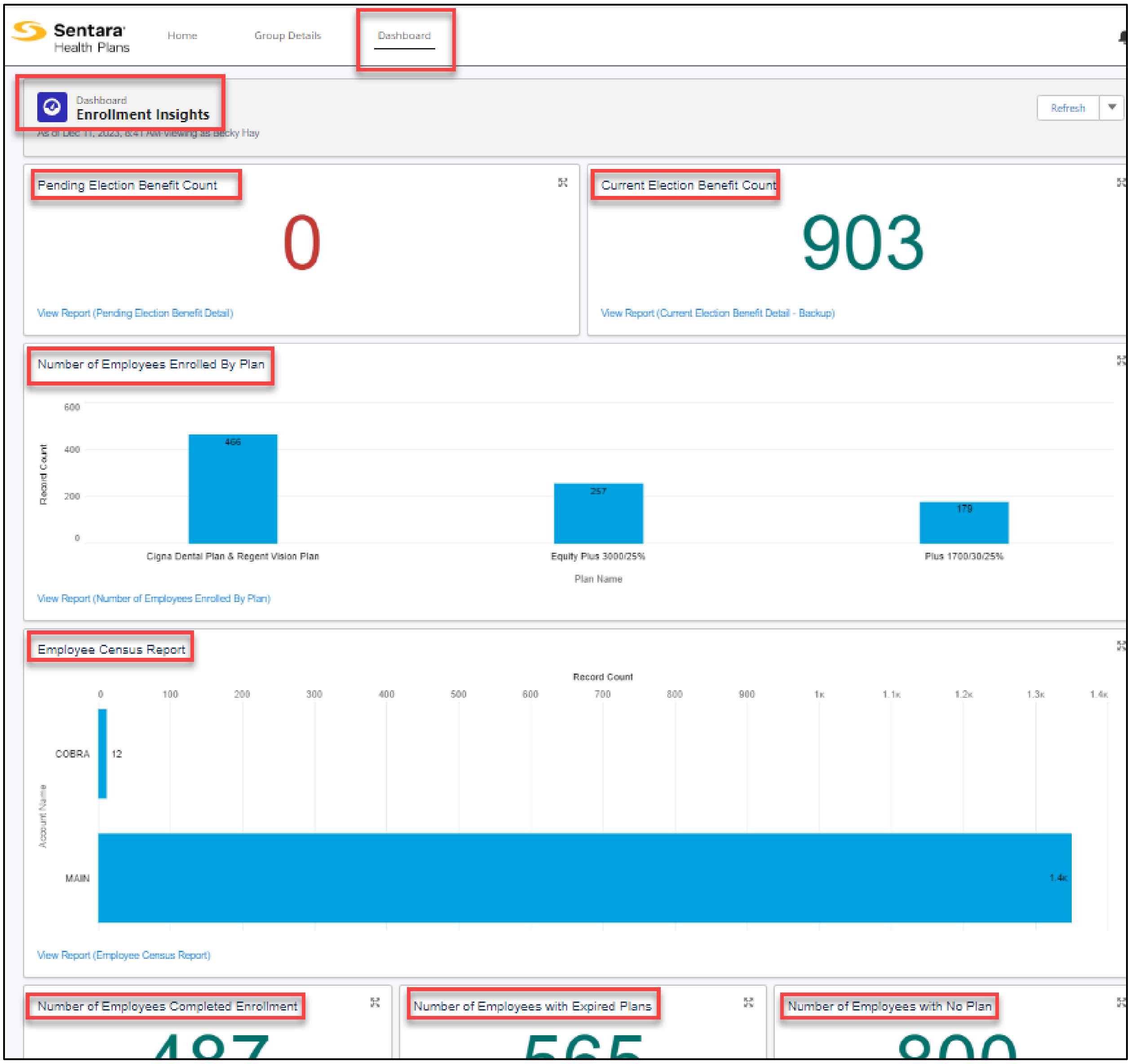
If you sell Employer Business, here you can manage your renewals and complete new business quotes created prior to April 10, 2023.



	Broker Account Name	City	Primary Producer	Status	Market Segment
1	1133TestGroup	Virginia Beach	Test A Broker1	Active	
2	2200 Parks Ave, Virginia Beach, VA 23451	Virginia Beach	Test A Broker1	Active	
3	AB Large Group	Norfolk	Test A Broker1	Active	
4	AB SG Test	St. Louis	Test A Broker1	Active	
5	AB WaR ROOM TEST	Virginia Beach	Test A Broker1	Active	
6	Al's Alligators	Virginia Beach	Test A Broker1	Active	
7	ALLWYN GLOBAL COMPANY	Virginia Beach	Test A Broker1	Active	
8	Atlantic Edge Staffing LLC	Portsmouth	Test A Broker1	Active	
9	Candy's Candy	Virginia Beach	Test A Broker1	Active	

Employer Benefits Enrollment (e3 Web Enrollment)

If you manage the enrollment for your group, here you are able to view and make changes to member enrollment by clicking Dashboard. This will generate various reports that you can access.



Individual New & Renewing

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


Questions?
Broker Services
Benefit Inquiries
Payment Center
FAQ
My Profile
Logout
Reset
Search

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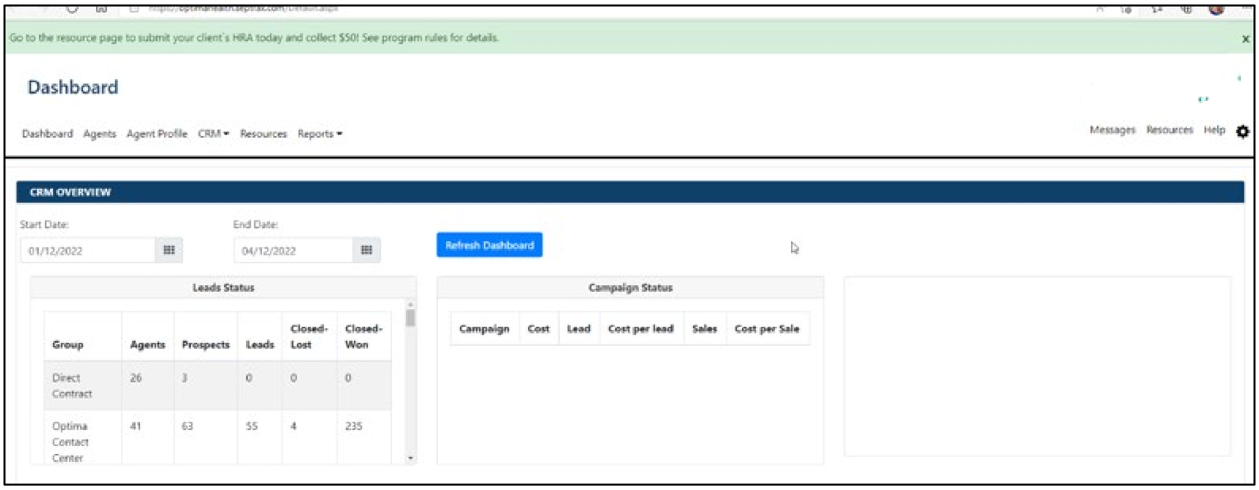
Medicare Enrollment

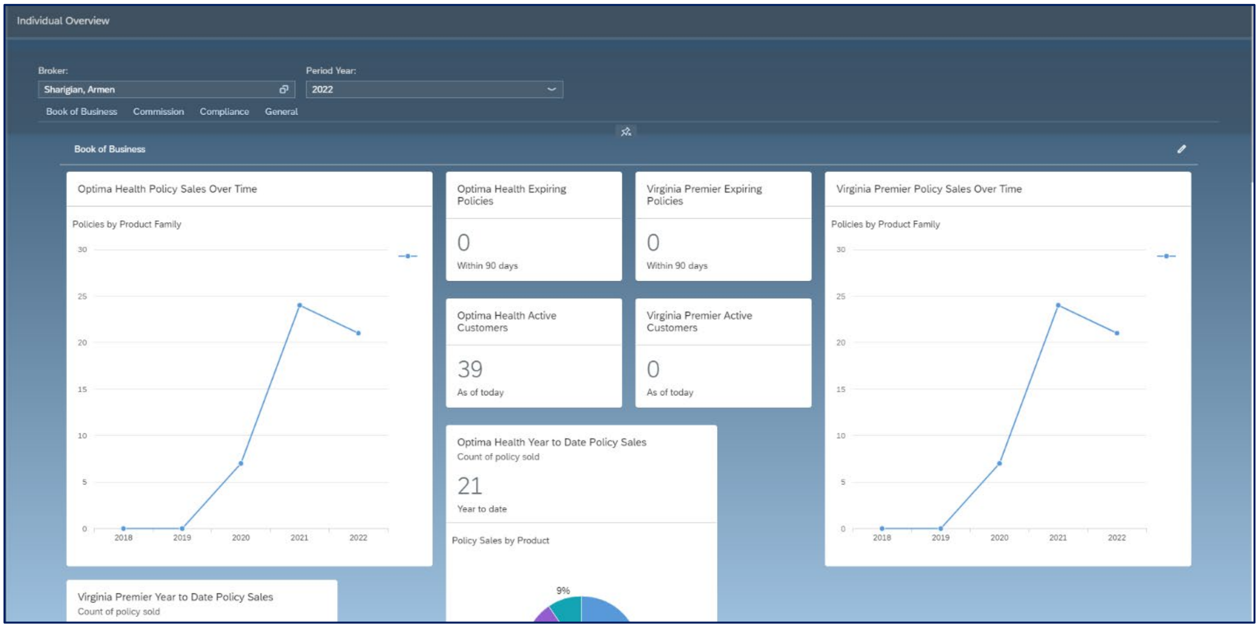
If you sell Medicare Advantage Plan, you have a Dashboard that shows all of your leads at-a-glance. You can view Products available in a particular zip code and view the benefits for those Products.

You are also able to view and edit your personal information, view Agents under your Agency, see a comprehensive list of important links and Plan materials. You can also request Plan materials and Brochures be sent directly to you.



Medicare Book of Business

Here you can view your sold Medicare policies.



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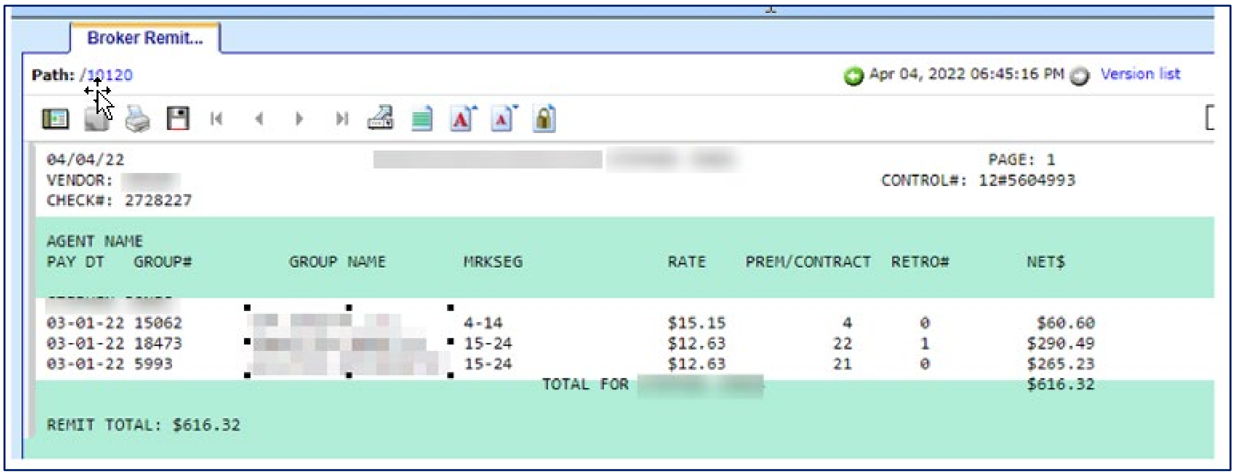
Commissions Statement

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.

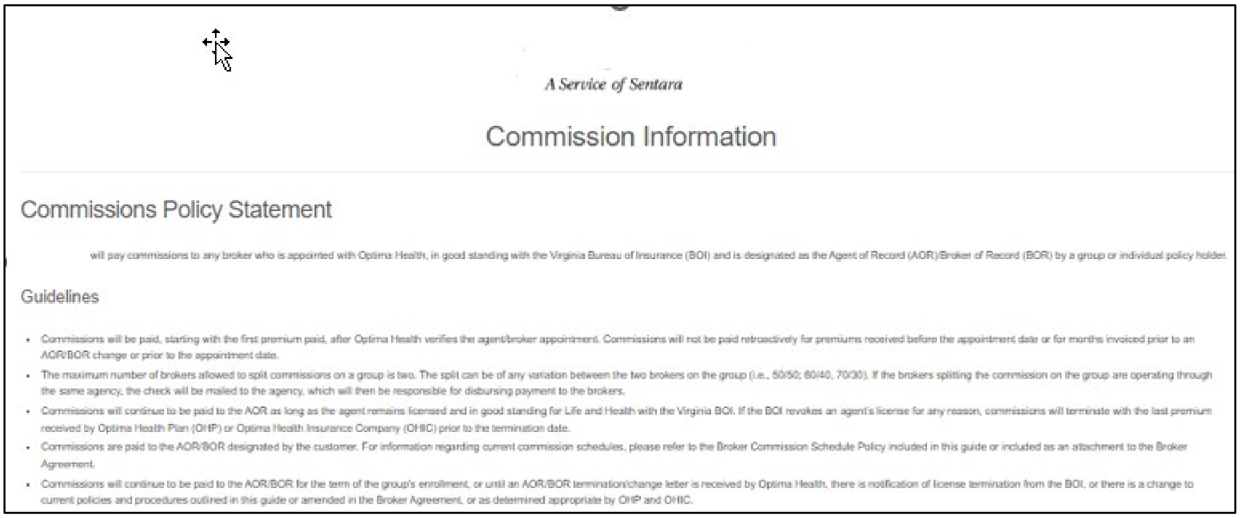


Commission Activity

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.

Commission Information

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

Commissions Policy Statement

will pay commissions to any broker who is appointed with Optima Health, 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.

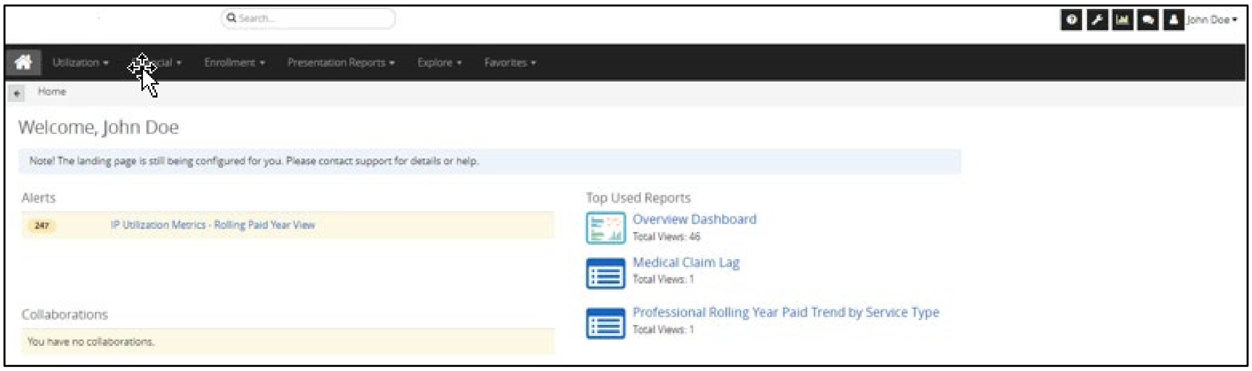
Guidelines

- Commissions will be paid, starting with the first premium paid, after Optima Health 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 by Optima Health Plan (OHP) or Optima Health Insurance Company (OHIC) prior 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.

Employer Group Reporting (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, generate reports and a customizable personal reporting dashboard.

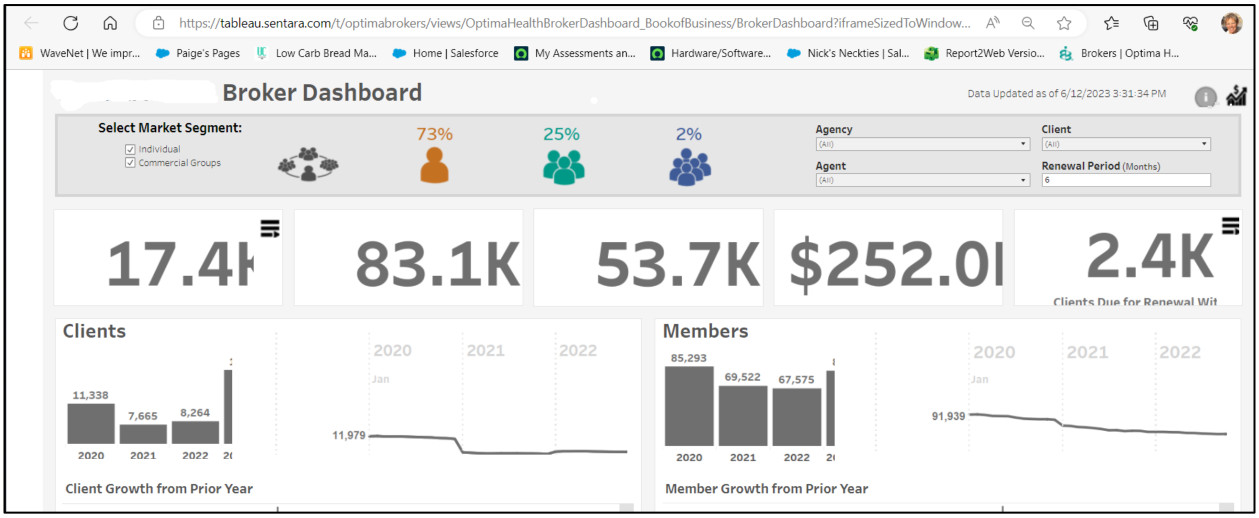
Within this tool, you are equipped with a learning library that offers multi-level training resources on the reporting tool also available at **sentarahealthplans.com/needtoknow**.



Broker Book of Business

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 prior year.



Sentara Health Plans

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!