

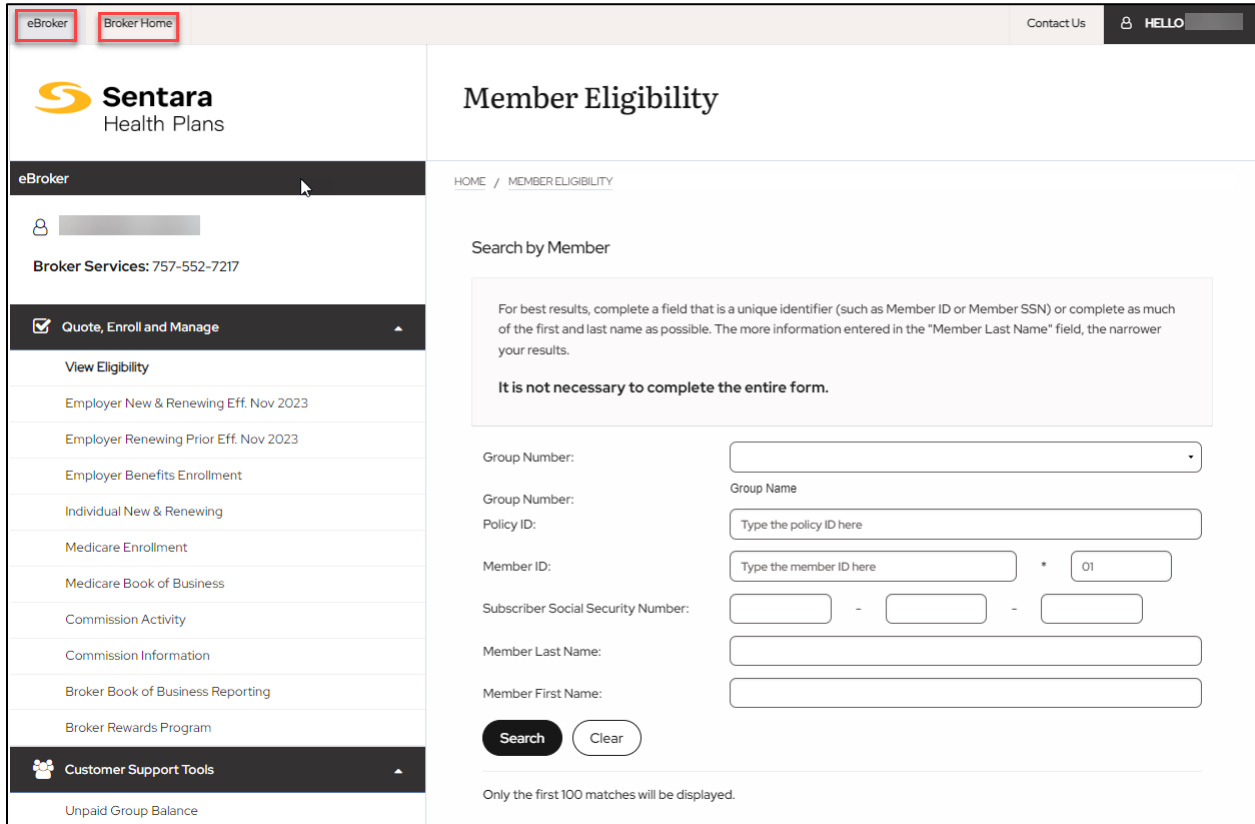
**Broker Portal Overview**  
**[sentarahealthplans.com](https://sentarahealthplans.com)**

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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.



The screenshot shows the 'Member Eligibility' page in the eBroker portal. The page includes a navigation menu on the left with options like 'Quote, Enroll and Manage', 'View Eligibility', and 'Customer Support Tools'. The main content area features a search form for members with fields for Group Number, Policy ID, Member ID, and Member Name. A note states that it is not necessary to complete the entire form.

**Member Eligibility**

HOME / MEMBER ELIGIBILITY

Search by Member

For best results, complete a field that is a unique identifier (such as 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 narrower your results.

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

Group Number:

Group Name

Group Number:

Policy ID:

Type the policy ID here

Member ID:  \*

Type the member ID here

Subscriber Social Security Number:  -  -

Member Last Name:

Member First Name:

Only the first 100 matches will be displayed.

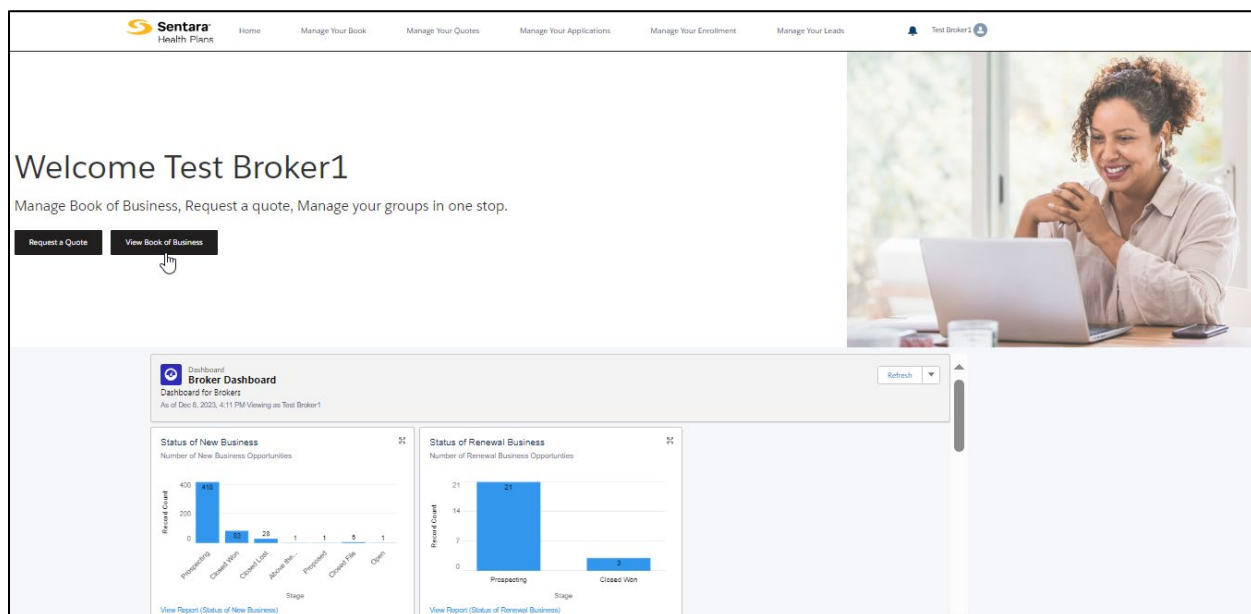
## **Your Homepage**

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

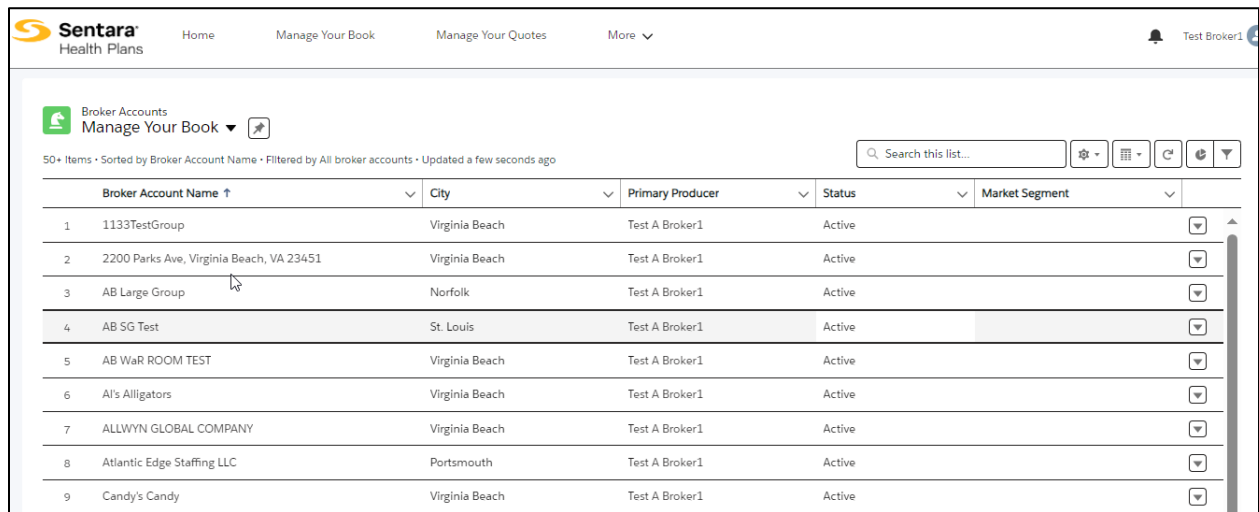
If you sell Employer Business, here you can request a new business quote starting April 10, 2023, track the status of your quote, and view your book of business.



The screenshot shows the 'Broker Dashboard' for 'Test Broker1'. The dashboard includes a navigation menu at the top with options like 'Home', 'Manage Your Book', 'Manage Your Quotes', 'Manage Your Applications', 'Manage Your Enrollment', and 'Manage Your Leads'. A 'Test Broker1' notification is visible in the top right. The main content area features a 'Welcome Test Broker1' message and two buttons: 'Request a Quote' and 'View Book of Business'. Below this, there are two bar charts: 'Status of New Business' and 'Status of Renewal Business'. The 'Status of New Business' chart shows counts for various stages: Propositing (418), Closed Won (38), Closed Lost (28), Active In... (1), Pending (1), Closed Pre (5), and Open (1). The 'Status of Renewal Business' chart shows counts for Propositing (21) and Closed Won (8). A 'Refresh' button is located in the top right of the dashboard area.

## Employer Renewals

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

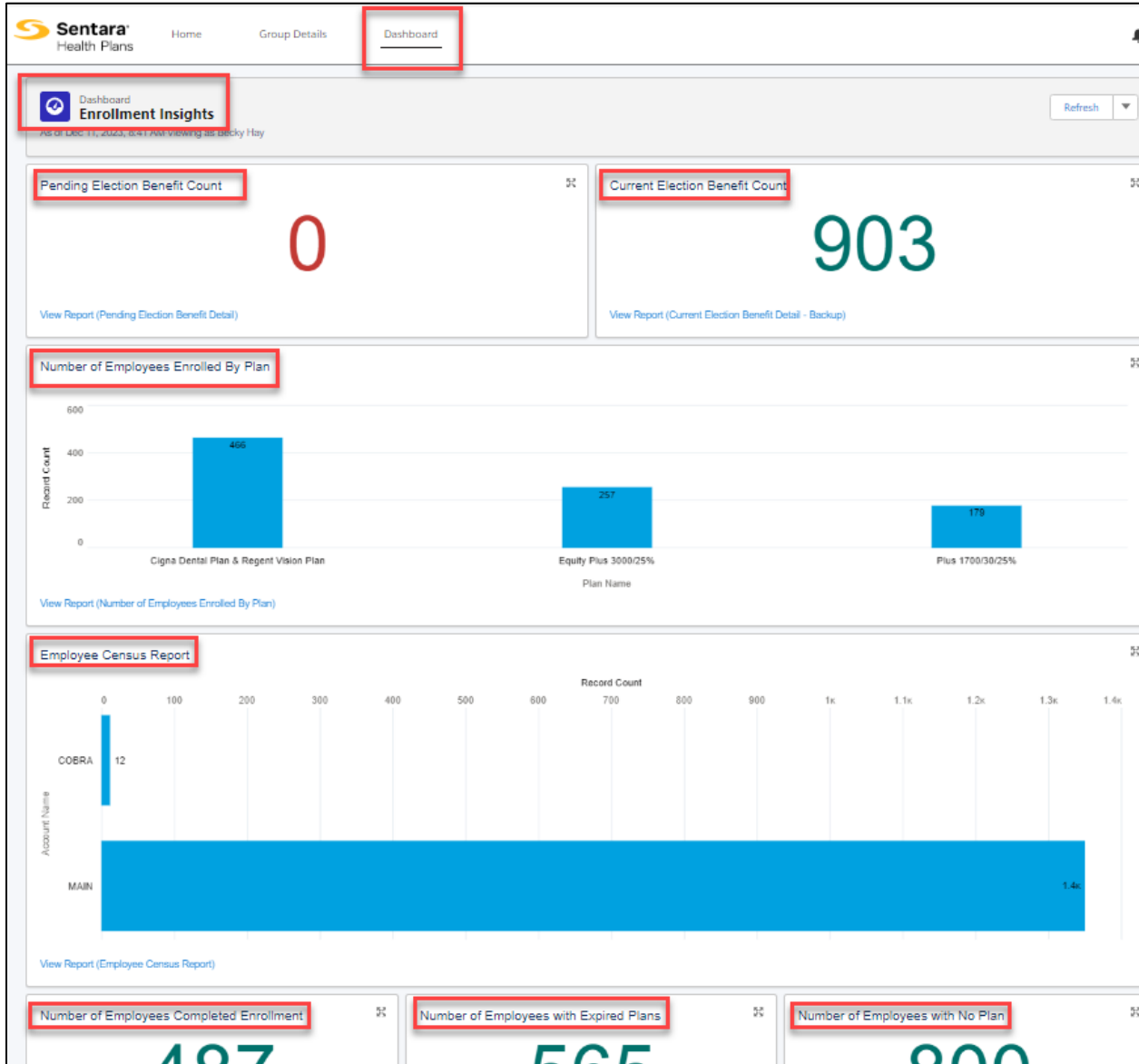


The screenshot shows the 'Manage Your Book' interface for Broker Accounts. It includes a search bar, a table with columns for Broker Account Name, City, Primary Producer, Status, and Market Segment, and a list of 9 items. The interface also shows navigation links like Home, Manage Your Book, and Manage Your Quotes.

	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	AI'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.

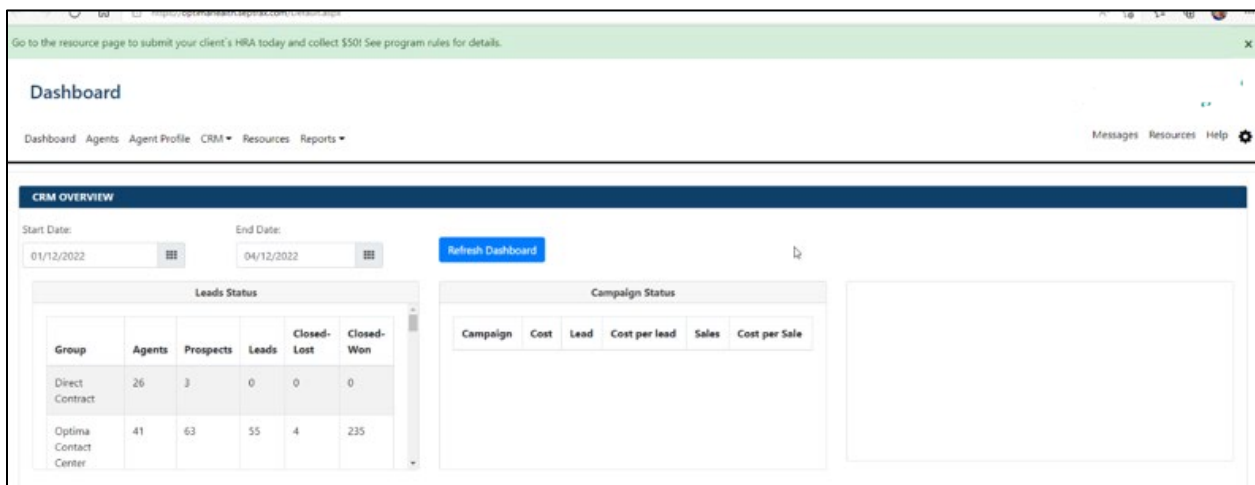




## Medicare Enrollment

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.



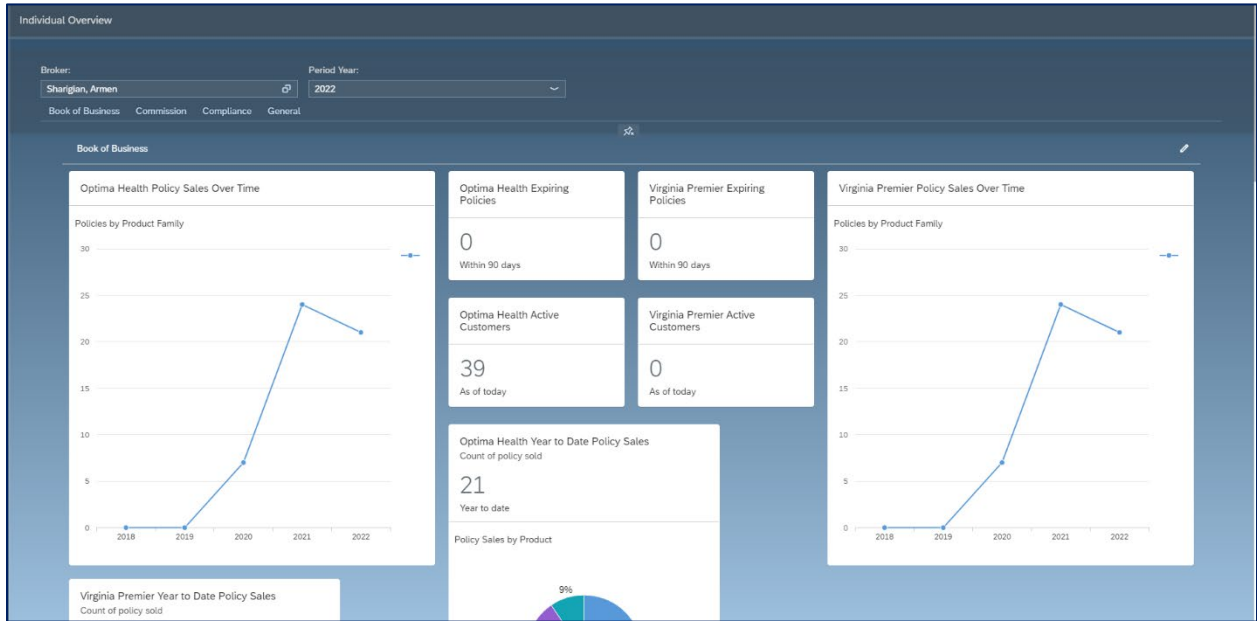
The screenshot displays a web dashboard titled "Dashboard" with a navigation menu including "Dashboard", "Agents", "Agent Profile", "CRM", "Resources", and "Reports". A notification banner at the top reads: "Go to the resource page to submit your client's HRA today and collect \$50! See program rules for details." Below the navigation is a "CRM OVERVIEW" section with date filters for "Start Date" (01/12/2022) and "End Date" (04/12/2022), and a "Refresh Dashboard" button. The dashboard contains two main data tables:

Leads Status					
Group	Agents	Prospects	Leads	Closed-Lost	Closed-Won
Direct Contract	26	3	0	0	0
Optima Contract Center	41	63	55	4	235

Campaign Status					
Campaign	Cost	Lead	Cost per lead	Sales	Cost per Sale

# Medicare Book of Business

Here you can view your sold Medicare policies.



## 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.

Broker Remit...								
Path: /10120						Apr 04, 2022 06:45:16 PM Version list		
04/04/22						PAGE: 1		
VENDOR: [REDACTED]						CONTROL#: 12#5604993		
CHECK#: 2728227								
AGENT NAME	PAY DT	GROUP#	GROUP NAME	MRKSEG	RATE	PREM/CONTRACT	RETRO#	NET\$
[REDACTED]	03-01-22	15062	[REDACTED]	4-14	\$15.15	4	0	\$60.60
[REDACTED]	03-01-22	18473	[REDACTED]	15-24	\$12.63	22	1	\$290.49
[REDACTED]	03-01-22	5993	[REDACTED]	15-24	\$12.63	21	0	\$265.23
TOTAL FOR								\$616.32
REMIT TOTAL: \$616.32								

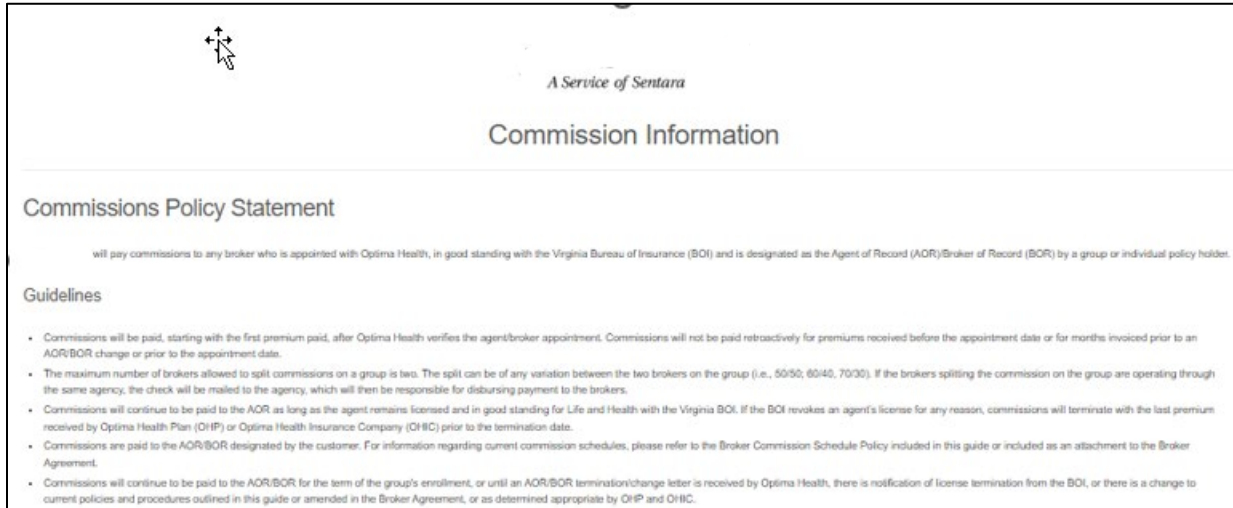
## Commission Activity

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.



The screenshot shows a document titled "Commission Information" under the heading "A Service of Sentara". The document is divided into two main sections: "Commissions Policy Statement" and "Guidelines".

**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.

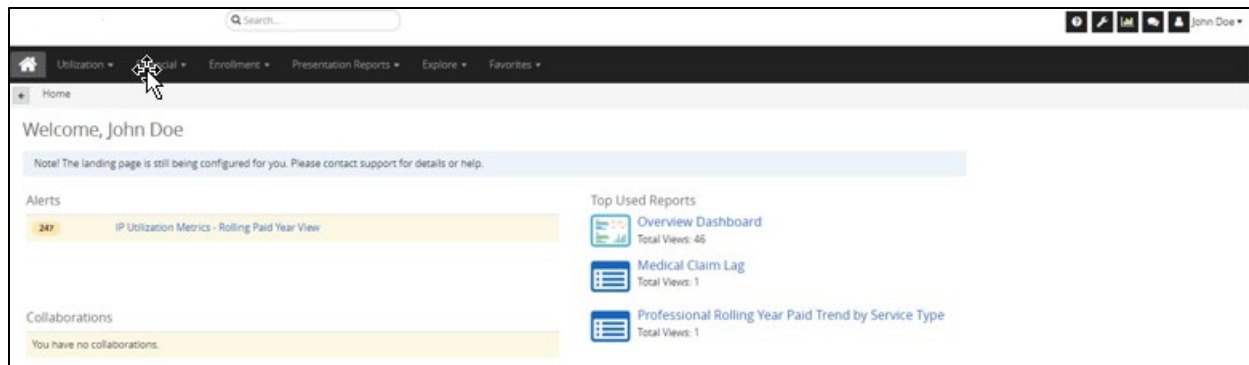
**Guidelines**

- 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.

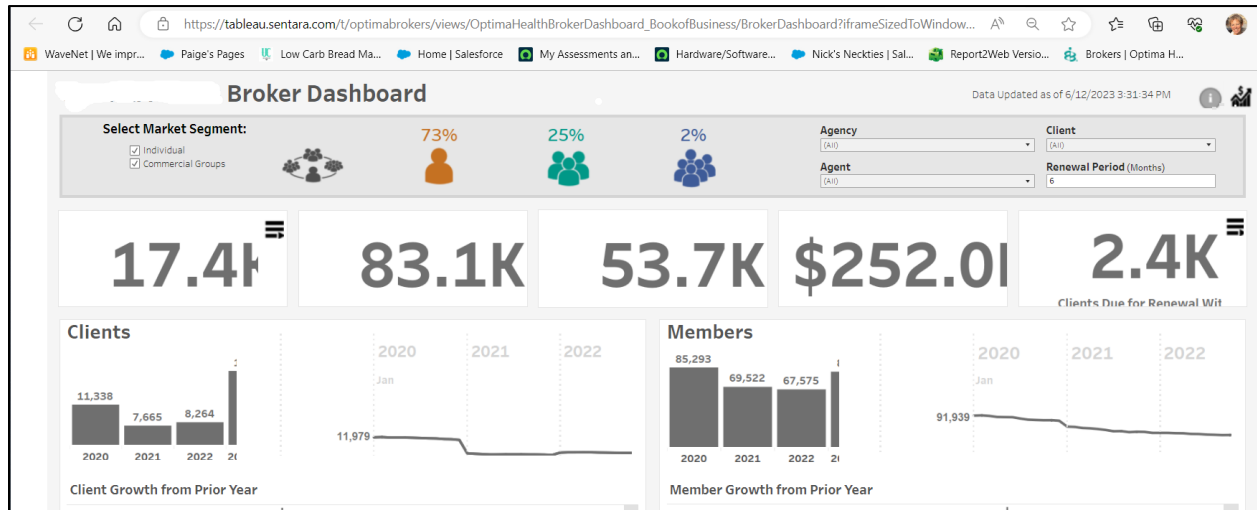
Within this tool, you are equipped with a learning library that offers multi-level training resources on the reporting tool also available at [sentarahealthplans.com/needtoknow](https://sentarahealthplans.com/needtoknow).



## Broker Book of Business

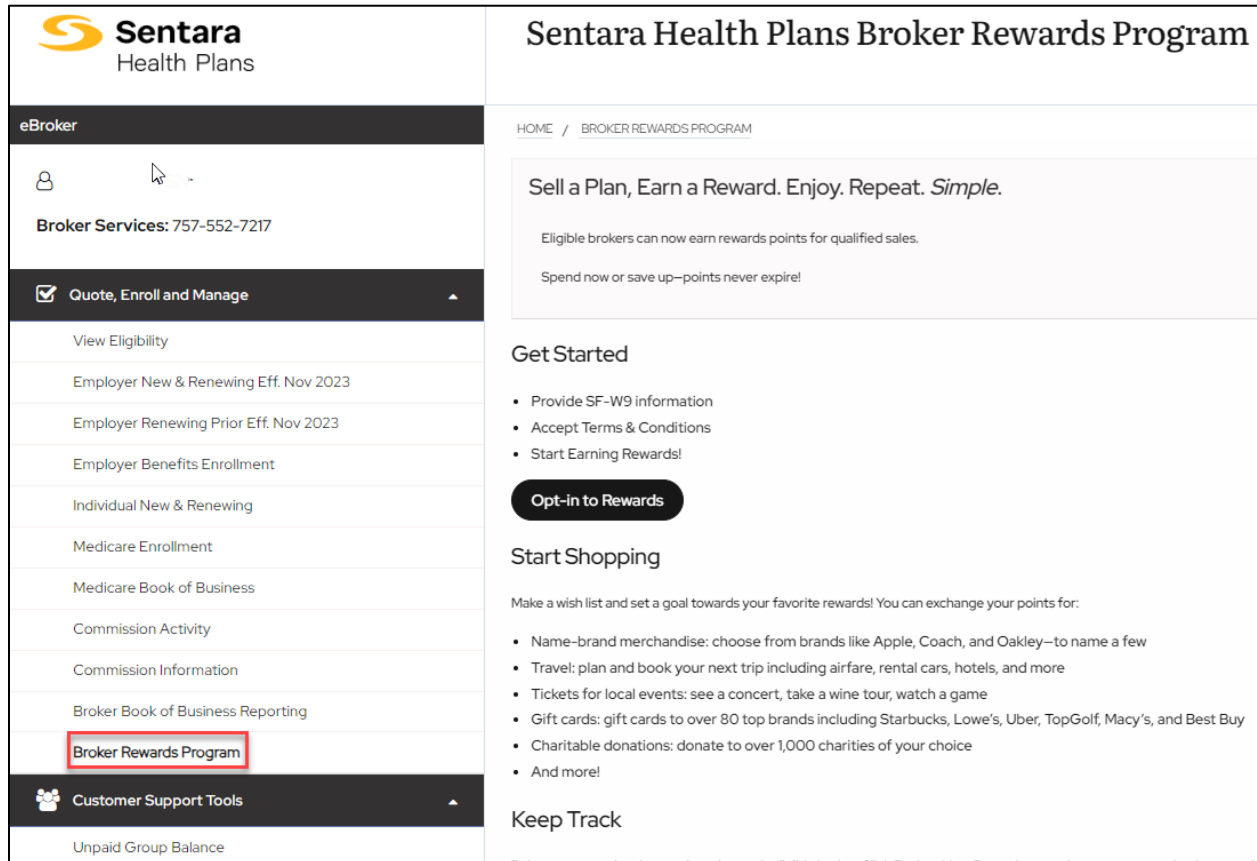
This interactive tool allows you to view your entire book of business or can be filtered by Market Segment or Product.

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



## 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!



The screenshot shows the 'Sentara Health Plans Broker Rewards Program' page. On the left is a navigation sidebar with the Sentara Health Plans logo at the top. Below the logo is the 'eBroker' section, which includes a user profile icon, the text 'Broker Services: 757-552-7217', and a 'Quote, Enroll and Manage' menu. The menu items are: View Eligibility, Employer New & Renewing Eff. Nov 2023, Employer Renewing Prior Eff. Nov 2023, Employer Benefits Enrollment, Individual New & Renewing, Medicare Enrollment, Medicare Book of Business, Commission Activity, Commission Information, Broker Book of Business Reporting, **Broker Rewards Program** (highlighted with a red box), and Customer Support Tools. At the bottom of the sidebar is 'Unpaid Group Balance'.

The main content area is titled 'Sentara Health Plans Broker Rewards Program'. It features a breadcrumb trail 'HOME / BROKER REWARDS PROGRAM'. Below this is a promotional banner: 'Sell a Plan, Earn a Reward. Enjoy. Repeat. *Simple.*' followed by the text 'Eligible brokers can now earn rewards points for qualified sales. Spend now or save up—points never expire!'. The 'Get Started' section lists three steps: 'Provide SF-W9 information', 'Accept Terms & Conditions', and 'Start Earning Rewards!'. There is a prominent 'Opt-in to Rewards' button. The 'Start Shopping' section encourages users to 'Make a wish list and set a goal towards your favorite rewards!' and lists examples: 'Name-brand merchandise: choose from brands like Apple, Coach, and Oakley—to name a few', 'Travel: plan and book your next trip including airfare, rental cars, hotels, and more', 'Tickets for local events: see a concert, take a wine tour, watch a game', 'Gift cards: gift cards to over 80 top brands including Starbucks, Lowe's, Uber, TopGolf, Macy's, and Best Buy', 'Charitable donations: donate to over 1,000 charities of your choice', and 'And more!'. The 'Keep Track' section is partially visible at the bottom.