Purpose: Instructions for Brokers to find Membership/Census info. This guide provides 5 options for viewing membership.

1. View **Member Eligibility** on the Broker Portal……Page 1
   - View a specific member's eligibility.
2. The **Members Tab** in eBroker……Page 2
   - View / download membership spreadsheet with member ID, plan number, and demographic information.
3. The **Proposal Document** for the Account Quote in eBroker……Page 4
   - View Membership from the Quote census.
4. The **Quote Details** in eBroker……Page 6
   - View Membership from the Quote census.
5. The **Contract** in eBroker……Page 8
   - View Membership uploaded on the initial enrollment or renewal census.

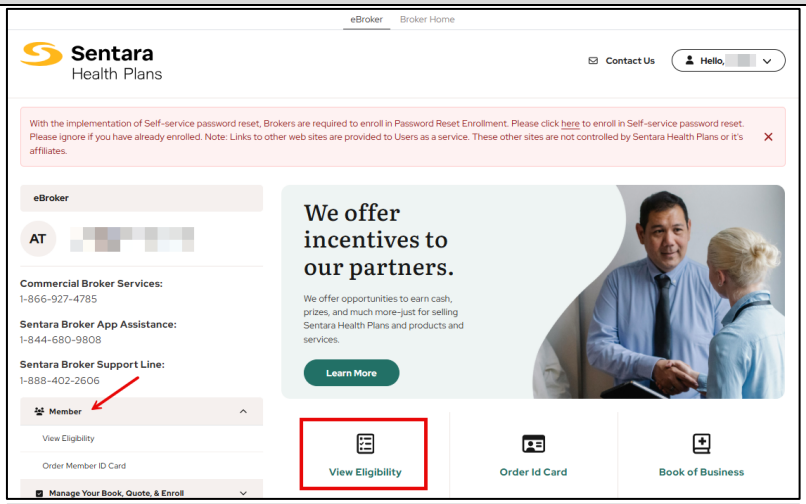
Option 1 – Member Eligibility on Broker Portal

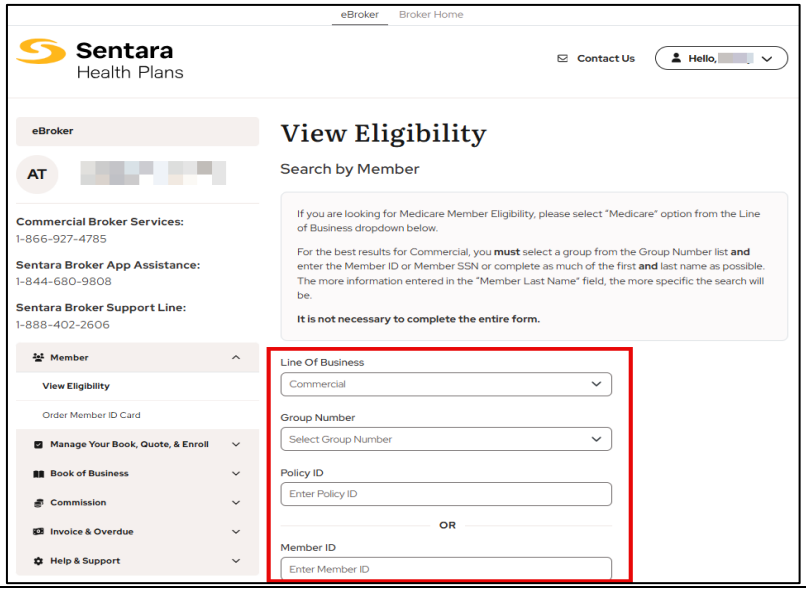
Visit Sentatahealthplans.com/ Brokers and sign in.

The Sentara Health Plans eBroker landing page displays.

Click on the **View Eligibility** tile to Search by Member here.

Note: Dependents are currently not available for viewing.



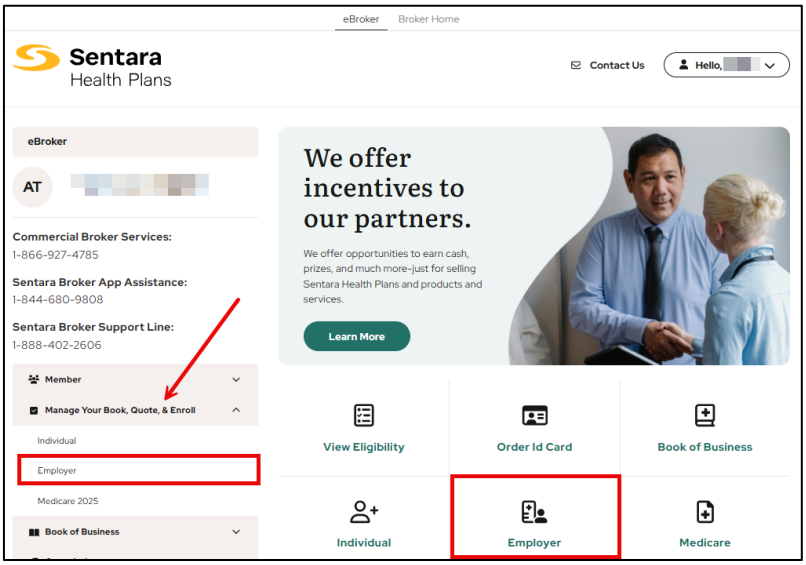


Option 2 – Members Tab

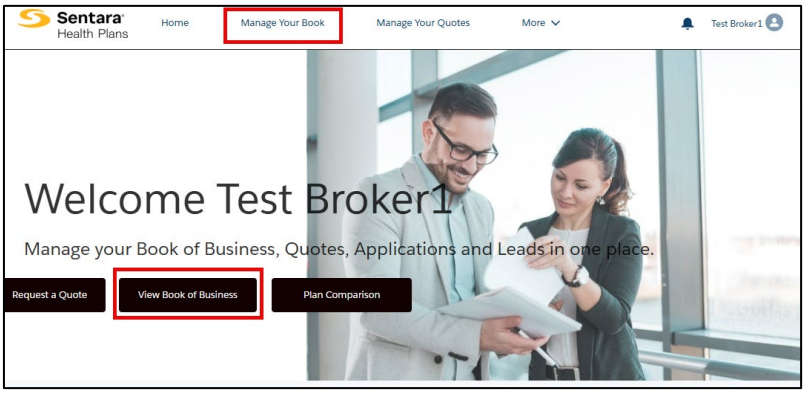
Visit: Sentatahealthplans.com/ Brokers and sign in.

The Sentara Health Plans eBroker landing page displays.

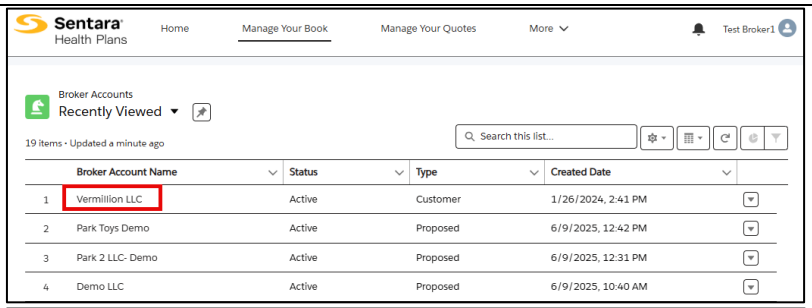
Click on the **Manage Your Book, Quote & Enroll** or the **Employer** tile. This takes you to the Quoting & Enrollment tool.



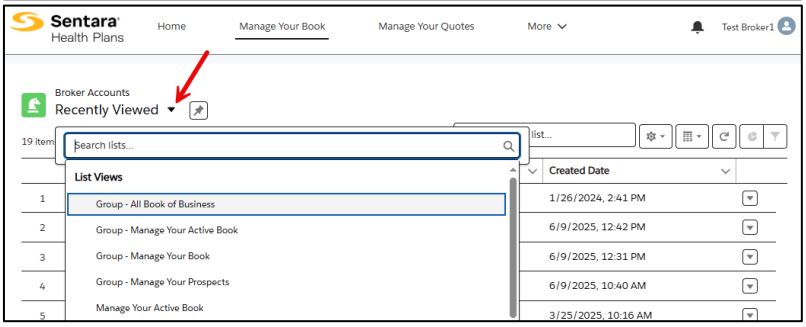
Navigate to your Book of Business by clicking **"Manage Your Book"** or **"View Book of Business".**

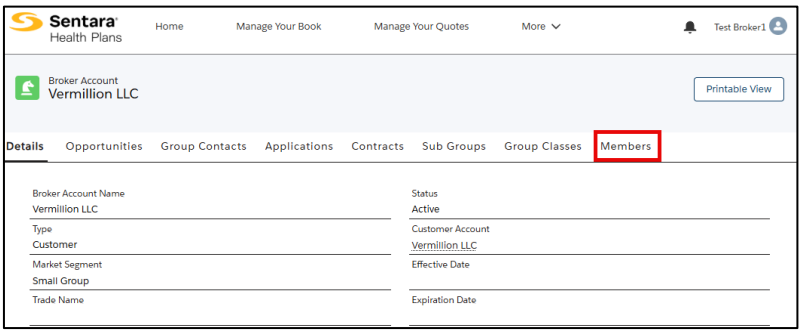
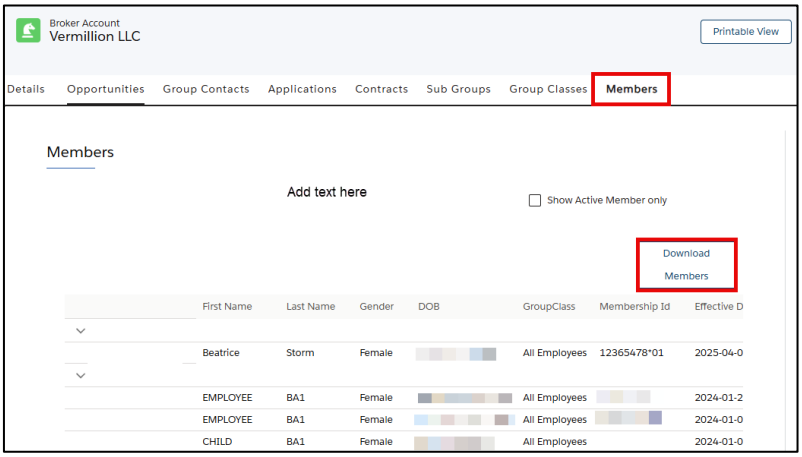
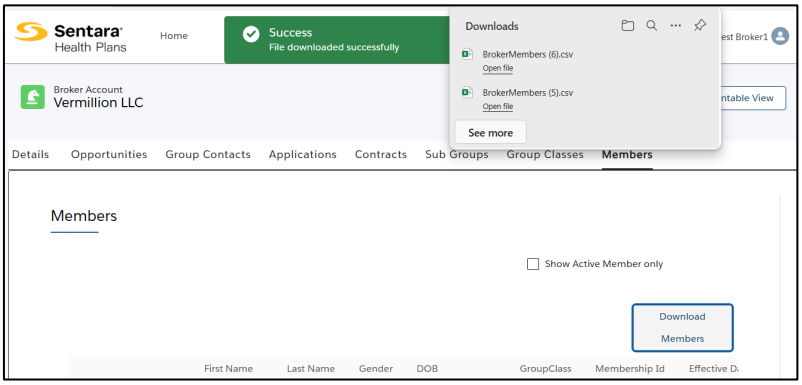


Select the Broker Account record by clicking the Broker Account Name.



Note: This always defaults to **"Recently Viewed".** Use the drop down menu and filter the Book of Business list view.



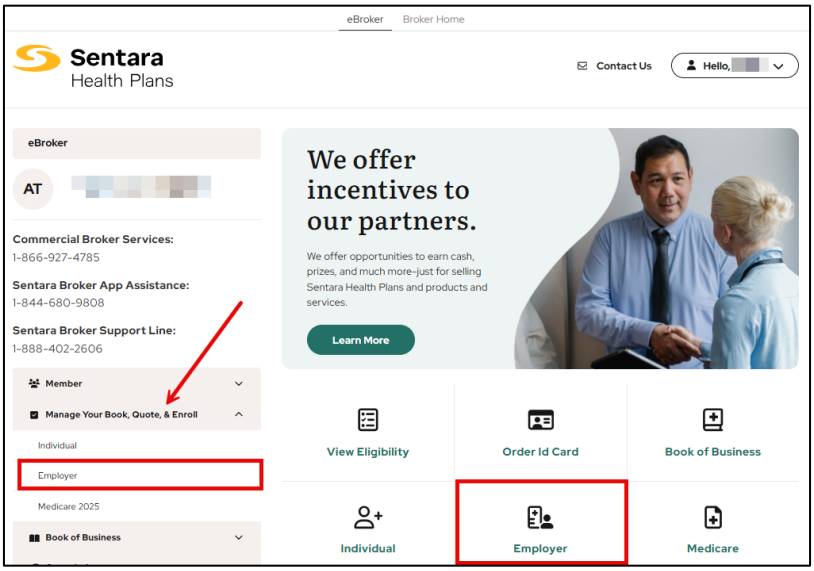
Select the “Members Tab” on the far right side of the Broker Account options.	
A Membership list will appear.	
Selecting the “Download Members” option will download the report in an Excel file.	

Option 3 – Proposal Document

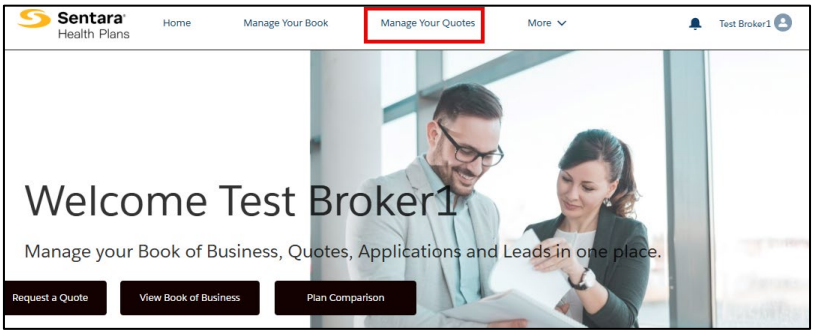
Visit: Sentatahealthplans.com/ Brokers and sign in.

The Sentara Health Plans eBroker landing page displays.

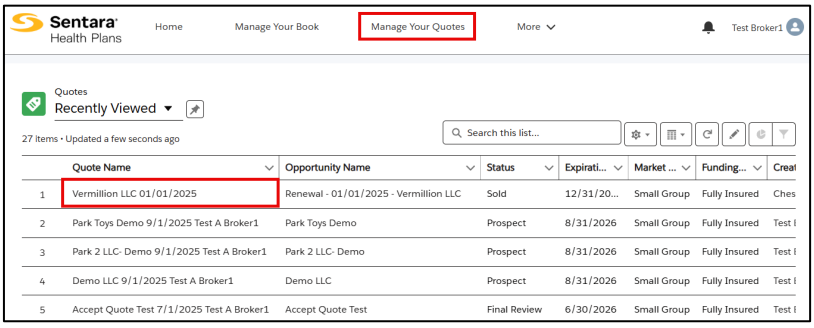
Click on the **Manage Your Book, Quote & Enroll** or the **Employer** tile. This takes you to the Quoting & Enrollment tool.



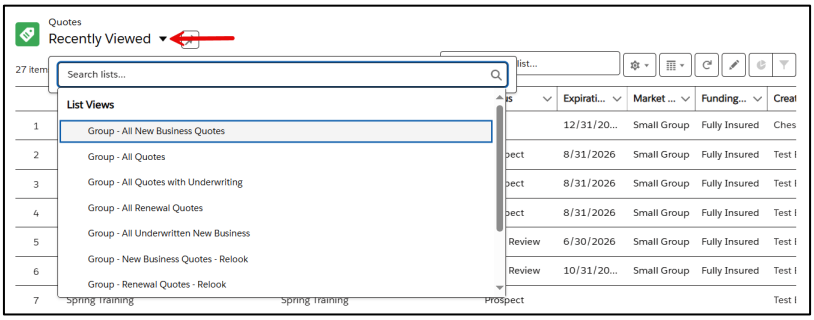
Click on **Manage Your Quotes** at the top of the page.

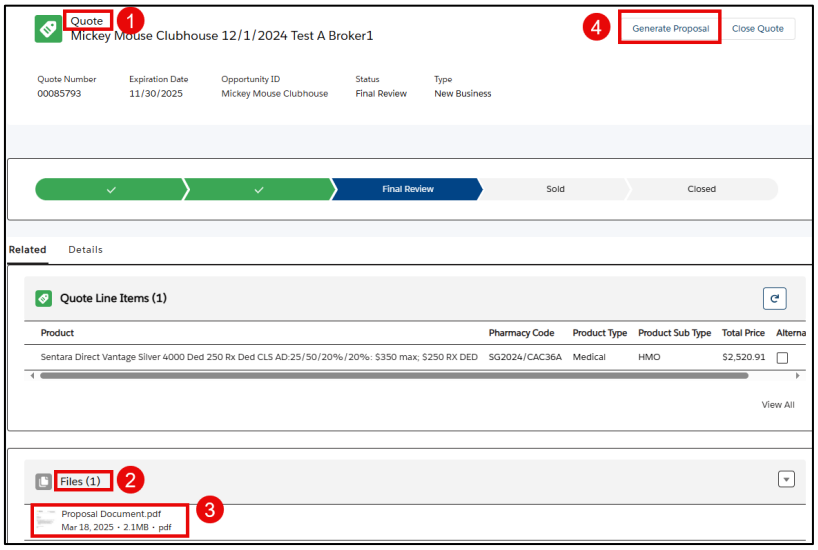
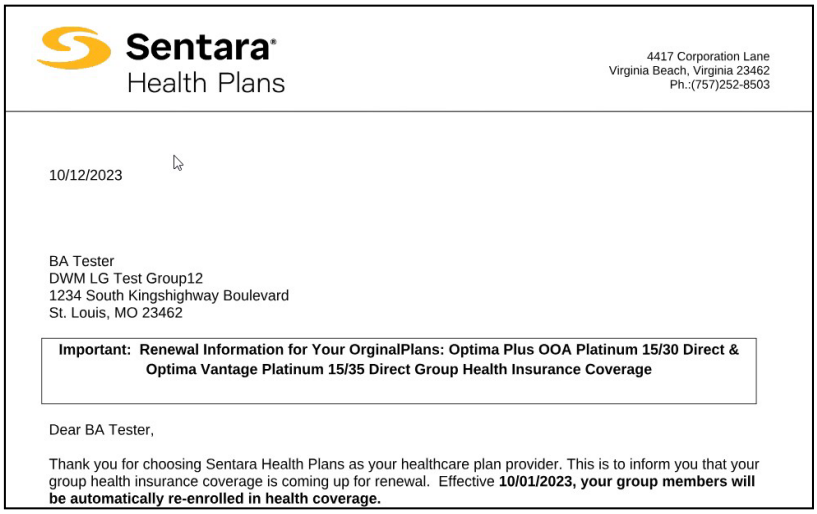
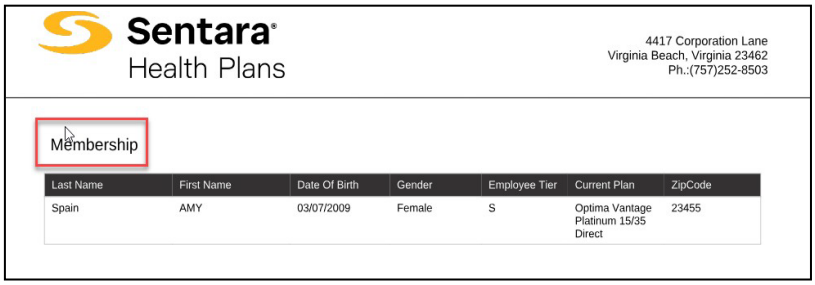


Under the **Quote Name** column, click on the name of the **Account** to go to the **Quote** page for that Account.



Note: This always defaults to **"Recently Viewed".** Use the drop down menu and filter the Quotes list view.



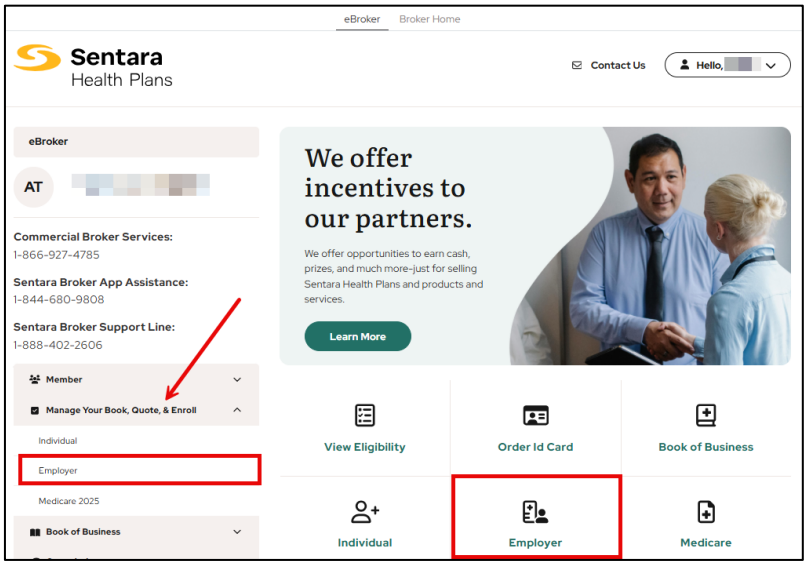
1. You are now on the **Quote** page. 2. At the bottom of the page is the **Files** section. 3. The **Proposal** Document is in the **Files** section. Click on the **Proposal Document** name to open the file. 4. If there is no File, use the **Generate Proposal** button to create a Proposal.	
The **Proposal** displays.	
Scroll down to the **Membership** page in the proposal. Here you will find the **Member Name, DOB, Gender, Employee Tier, Current Plan, and Zip Code**. If they exist **Member Dependents** are located here.	

Option 4 – Quote Details

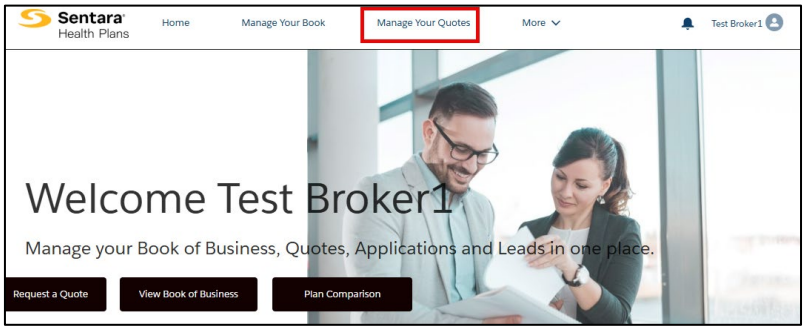
Visit: Sentatahealthplans.com/ Brokers and sign in.

The Sentara Health Plans eBroker landing page displays.

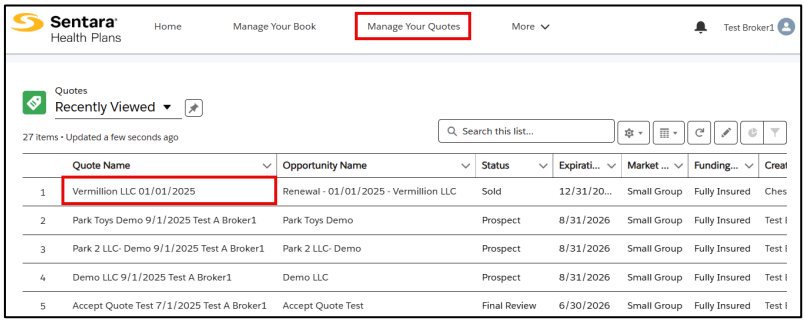
Click on the **Manage Your Book, Quote & Enroll** or the **Employer** tile. This takes you to the Quoting & Enrollment tool.



Click on **Manage Your Quotes** at the top of the page.

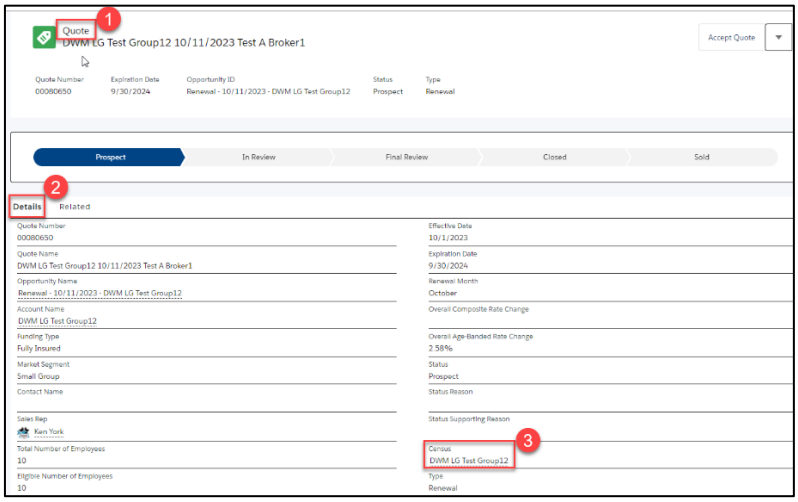
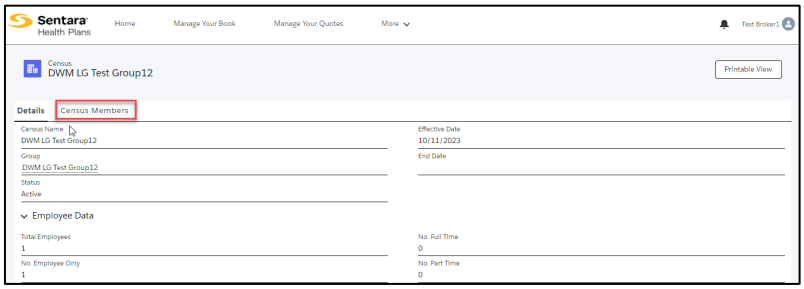
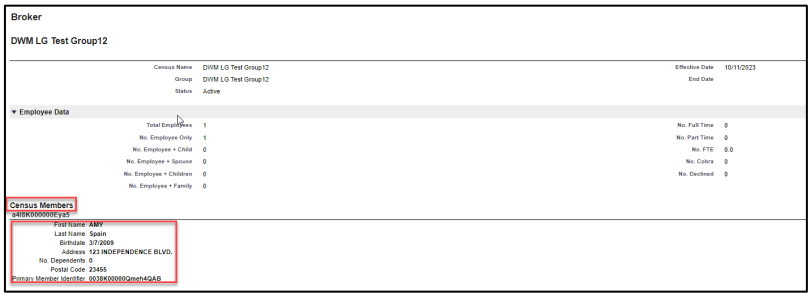


Under the **Quote Name** column, click on the name of the **Account** to go to the **Quote** page for that Account.



Note: This always defaults to **"Recently Viewed".** Use the drop down menu and filter the Quotes list view.



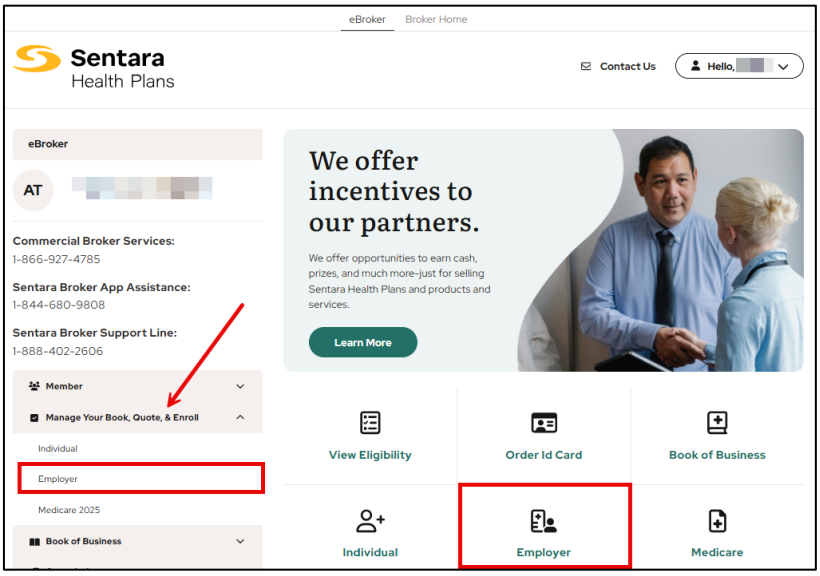
1. Start on the Quote Page. 2. Click on the **Details** tab. 3. Scroll down and click on the link in the **Census** field.	
The **Census** page displays. Click on **Census Members**.	
1. Click **View All** to display all Members. 2. **Member** info displays. 3. Click on **Printable View**. Note: This sample **Group** only has one member.	
The **Member** info document displays. The **Group/Plan number** and **Member ID number** do not display. This functionality is under development.	

Option 5 - Contract

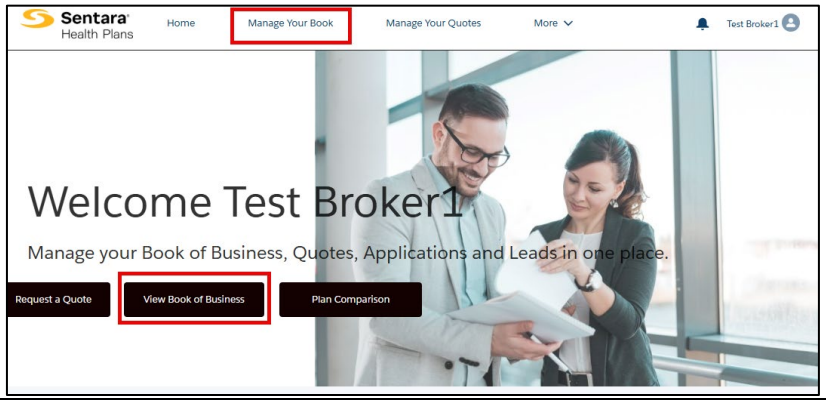
Visit: Sentatahealthplans.com/ Brokers and sign in.

The Sentara Health Plans eBroker landing page displays.

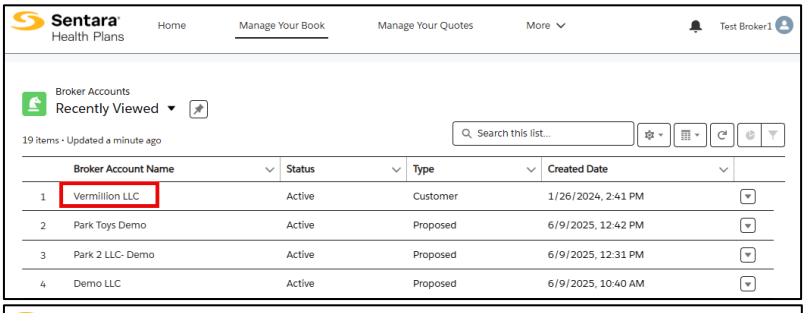
Click on the **Manage Your Book, Quote & Enroll** or the **Employer** tile. This takes you to the Quoting & Enrollment tool.



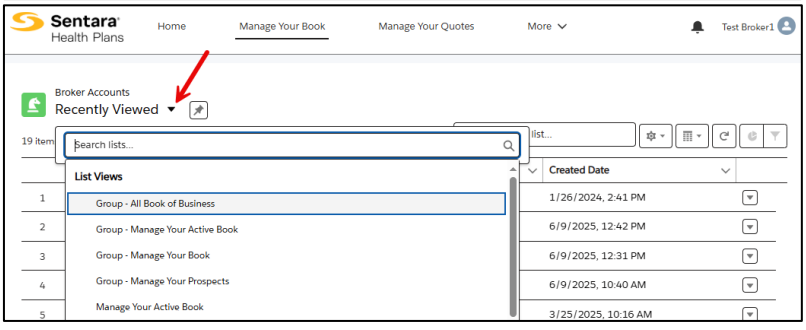
Navigate to your Book of Business by clicking **"Manage Your Book"** or **"View Book of Business".**

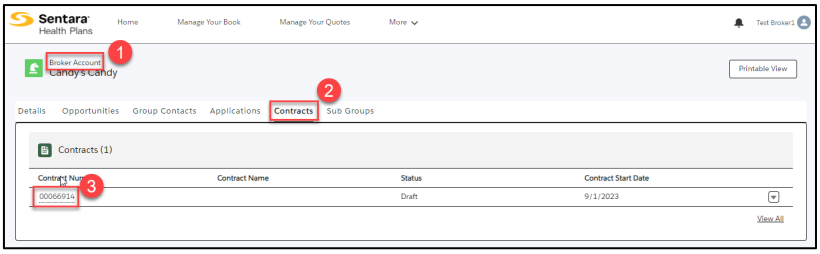
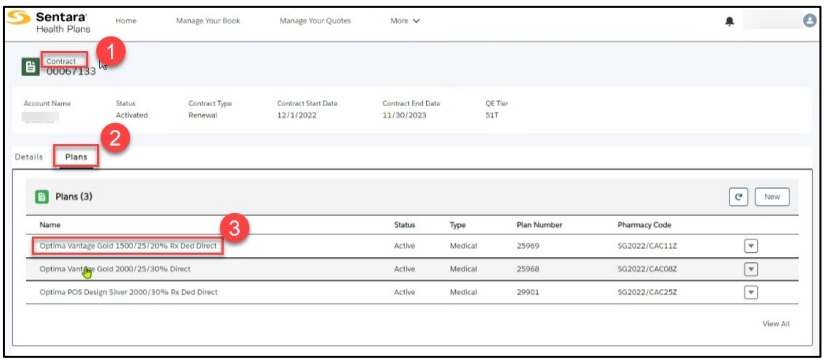


Select the Broker Account record by clicking the Broker Account Name.



Note: This always defaults to **"Recently Viewed".** Use the drop down menu and filter the Book of Business list view.



1. Navigate to the **Broker Account** page 2. Click on **Contracts** 3. Click on **Contract Number**	
1. The **Contract** page displays 2. Click on the **Plan** tab 3. Click on the desired **Plan**	
Now on the **Quote Plan** page, click the **Related** tab. This will bring up the list of **Members** with their Name, Gender, DOB, Group Class, Membership ID, and Status. You can also see **Dependents** here.	