

## **Broker Homepage, Dashboard and Navigation Overview**

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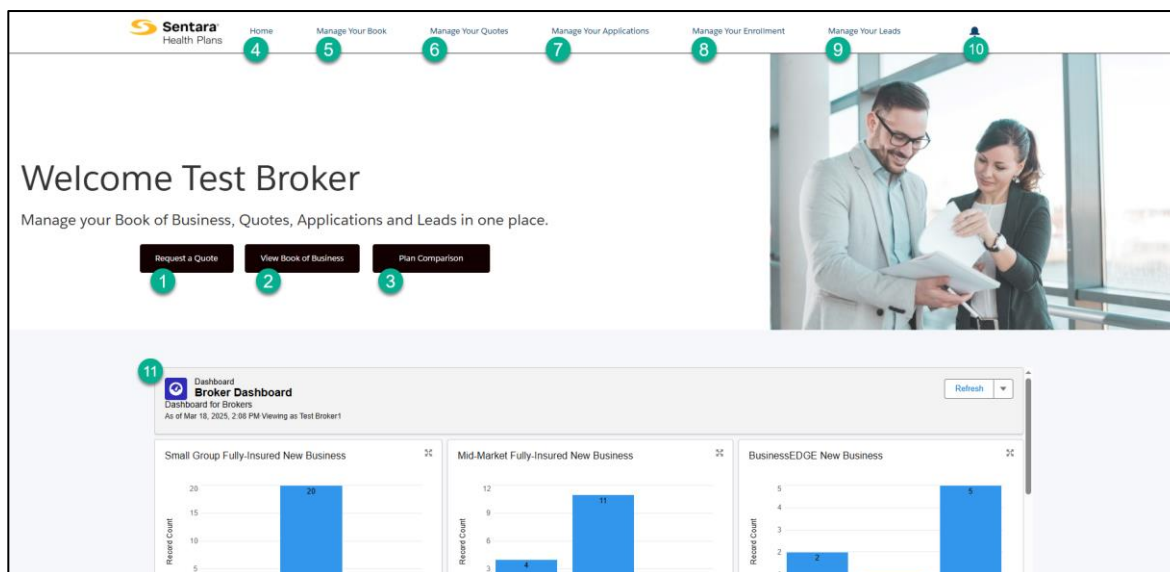
## Purpose

The purpose of this user guide is to provide an overview of the eBroker homepage and guidance for navigating the various options.

## Your Homepage

The eBroker homepage offers the following options:

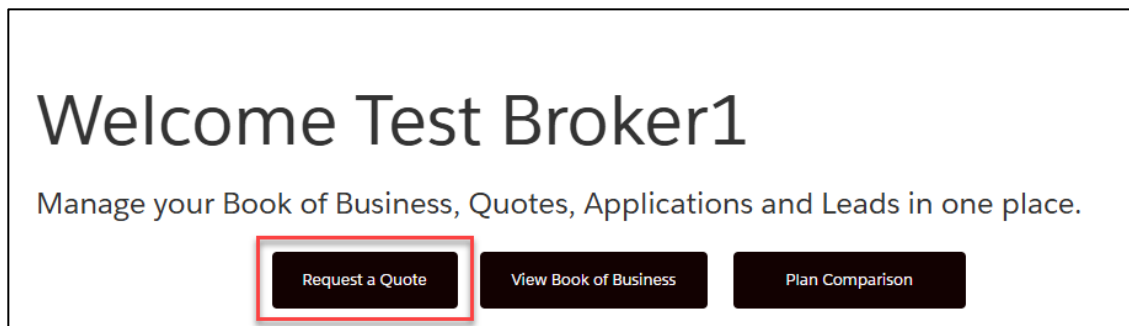
1. Request a quote
2. View Book of Business
3. Plan Comparison
4. Home
5. Manage Your Book
6. Manage Your Quotes
7. Manage Your Applications
8. Manage Your Enrollment
9. Manage Your Leads
10. Notification Bell
11. View Dashboard Reports



## Request a Quote

From the homepage of your portal, click on **Request a Quote** to begin a new for Small Group, Mid-Market and Level Funded.

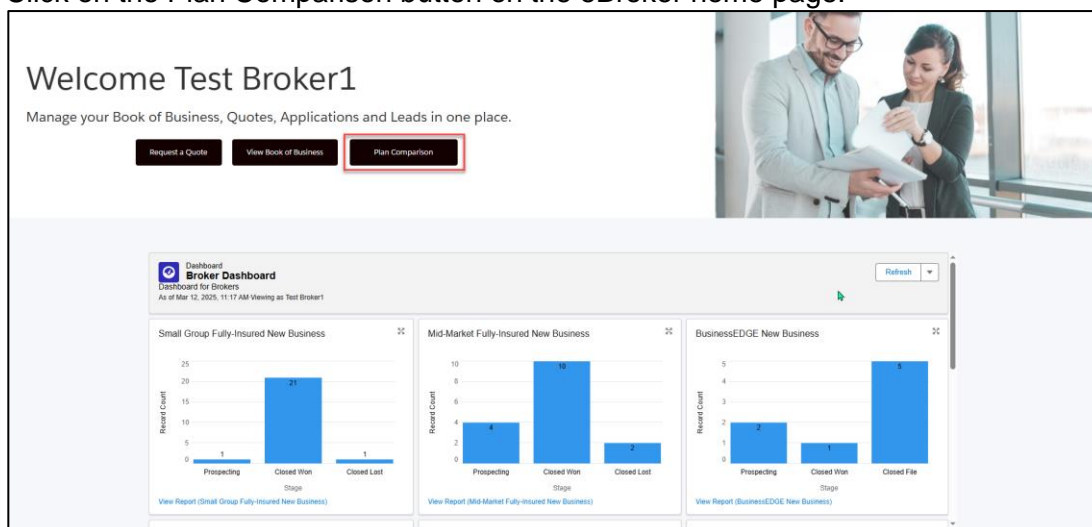
Please see the Quoting User guides for details on how to complete a quote.



## Plan Comparison

The Plan Comparison Solution leverages an AI model tool that generates a side-by-side comparison of Sentara's plans against an incumbent's plan, highlighting differences and similarities. A scoring mechanism elevates how closely Sentara's plans align with the uploaded incumbent plan, providing a quantitative measure of similarity for informed decision making.

Click on the Plan Comparison button on the eBroker home page.



The Plan Comparison page is displayed and defaults to the Market Segment – Small Group.

### Plan Comparison Made Simple

Instantly Compare Incumbent Plan with Sentara Plans

MARKET SEGMENT

Small Group

ZIP CODE

Enter your zip code

COUNTY

COMPARE

UPLOAD SBC DOCUMENT

Enter the following information:

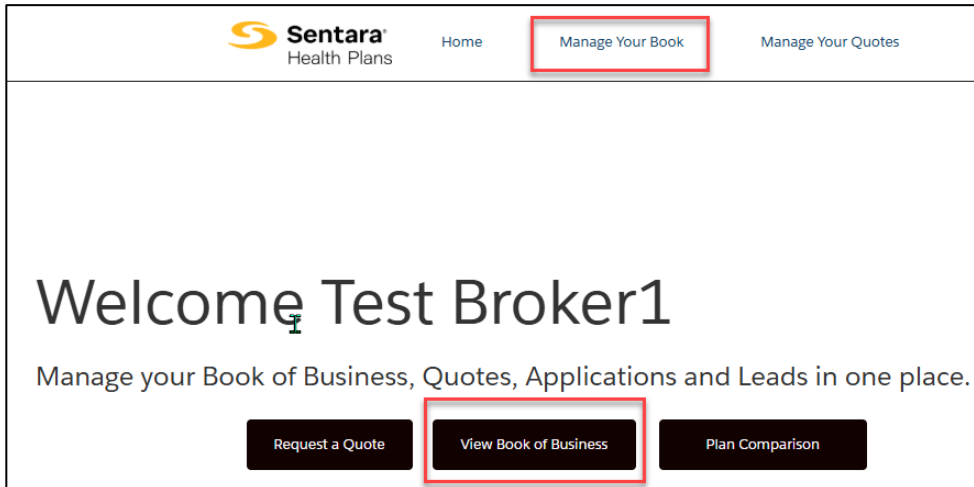
- **Market Segment** – Select the Market Segment from the dropdown menu.
- **Zip Code** – Type the zip code and then select it from the display list.
- **County Field** – Select the County from the display list.
  - If a single county matches the zip code that was entered, it automatically fills in the county field.
  - If a zip code has more than one match of counties you are required to select the county of your interest
- **Upload SBC Document** – Click the button and upload the incumbent's SBC document from your computer.

Sentara's plans are evaluated against an incumbent plan based on a defined set of plan provisions such as benefits and services. Each plan provision is assigned a predetermined weight with some provisions carrying more significance than others. These weights contribute to the calculation of a planned matching score which quantifies the similarity or alignment between the paired health plans.

In-network individual deductible	\$6,200	✓ \$6000
In-network family deductible	\$12,400	✓ \$12000
Out-of-network individual deductible	\$12,400	⚠ \$18000
Out-of-network family deductible	\$24,800	⚠ \$36000
In-network out-of-pocket maximum (Individual)	\$8,700	✓ \$8700

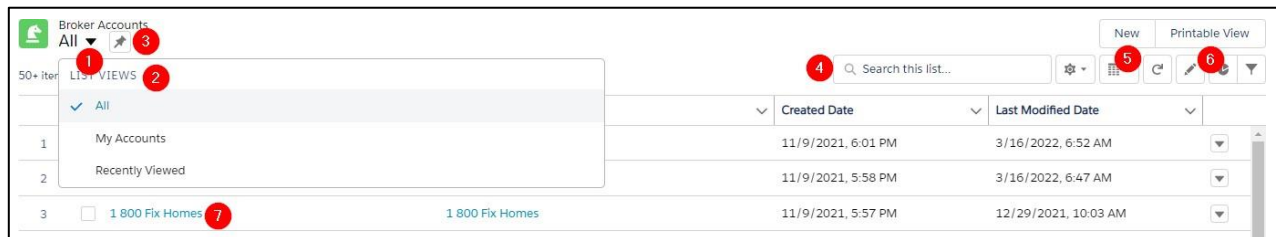
## View Book of Business and Manage Your Book

There are 2 ways you can view your Book of Business from your homepage - **View Book of Business** or **Manage Your Book**. The View Book of Business and Manage Your Book buttons take you to the same list view.



From the Book of Business screen, you can perform the following activities:

1. adjust your view of accounts by clicking on the arrow by the account list
2. select which list of accounts you would like to view
3. pin a list by clicking on the pushpin image
4. search the list by utilizing the *Search this list* field
5. create a new account by clicking **New**
6. generate a printable view of the list by clicking **Printable View**
7. manage your group's enrollments by clicking on the **account name**



Groups in your Book of Business are called “Broker Accounts”. All Broker Accounts are shown in “list views”.

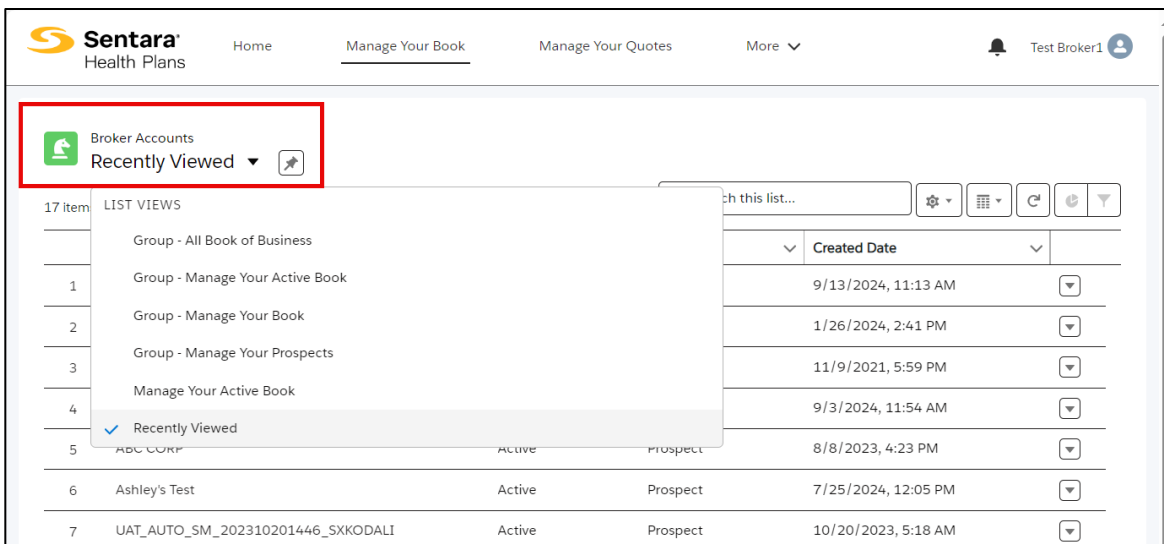
## Navigation Tip

Pay attention to the **Column Headers** in the list views before you click on your selection. Make sure to click on the link listed under the Column Header of the screen you want to view.

If you click on the wrong link or item, click the back button to return to the list view and make your selection again.

## Recently Viewed

The Manage Your Book tab defaults to a **Recently Viewed** list. Select the drop down arrow to filter your Broker Accounts into a specific list.

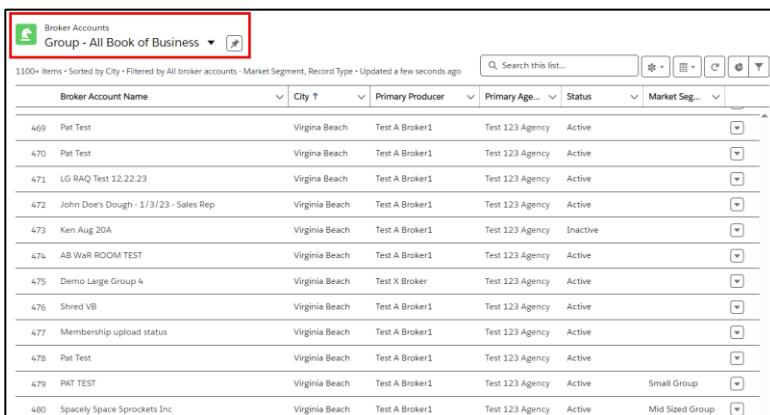


The screenshot shows the 'Manage Your Book' tab in the Sentara Health Plans interface. A red box highlights the 'Broker Accounts' dropdown menu, which is currently set to 'Recently Viewed'. The dropdown menu lists several options: 'Group - All Book of Business', 'Group - Manage Your Active Book', 'Group - Manage Your Book', 'Group - Manage Your Prospects', 'Manage Your Active Book', and 'Recently Viewed' (which is selected with a checkmark). Below the dropdown, a table displays a list of broker accounts with columns for 'Broker Account Name', 'City', 'Primary Producer', 'Primary Age', 'Status', and 'Market Seg...'. The table shows 17 items, with the first few rows visible.

Broker Account Name	City	Primary Producer	Primary Age	Status	Market Seg...
1	Group - All Book of Business				
2	Group - Manage Your Active Book				
3	Group - Manage Your Book				
4	Group - Manage Your Prospects				
5	Manage Your Active Book				
6	Ashley's Test	Active	Prospect	7/25/2024, 12:05 PM	
7	UAT_AUTO_SM_202310201446_SXKODALI	Active	Prospect	10/20/2023, 5:18 AM	

## Group - All Book of Business

This list view includes: All Broker Accounts (active, inactive, and prospects)

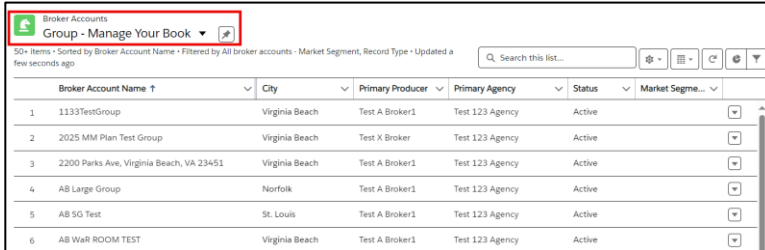


The screenshot shows the 'Manage Your Book' tab in the Sentara Health Plans interface. A red box highlights the 'Broker Accounts' dropdown menu, which is currently set to 'Group - All Book of Business'. The dropdown menu lists several options: 'Group - All Book of Business', 'Group - Manage Your Active Book', 'Group - Manage Your Book', 'Group - Manage Your Prospects', 'Manage Your Active Book', and 'Recently Viewed'. Below the dropdown, a table displays a list of broker accounts with columns for 'Broker Account Name', 'City', 'Primary Producer', 'Primary Age', 'Status', and 'Market Seg...'. The table shows 17 items, with the first few rows visible.

Broker Account Name	City	Primary Producer	Primary Age	Status	Market Seg...
469 Pat Test	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
470 Pat Test	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
471 LG RAQ Test 12.22.23	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
472 John Doe's Dough - 1/3/23 - Sales Rep	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
473 Ken Aug 20A	Virginia Beach	Test A Broker1	Test 123 Agency	Inactive	
474 AB War ROOM TEST	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
475 Demo Large Group 4	Virginia Beach	Test X Broker	Test 123 Agency	Active	
476 Shred VB	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
477 Membership upload status	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
478 Pat Test	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
479 PAT TEST	Virginia Beach	Test A Broker1	Test 123 Agency	Active	Small Group
480 Spacely Space Sprockets Inc	Virginia Beach	Test A Broker1	Test 123 Agency	Active	Mid Sized Group

## Group - Manage Your Book

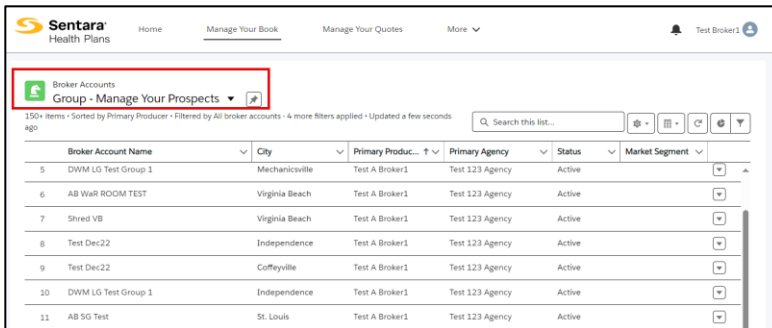
This list view includes: All Broker Accounts (active, inactive, and prospects)



Broker Account Name	City	Primary Producer	Primary Agency	Status	Market Segment
1133TestGroup	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
2025 MM Plan Test Group	Virginia Beach	Test X Broker	Test 123 Agency	Active	
2200 Parks Ave, Virginia Beach, VA 23451	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
AB Large Group	Norfolk	Test A Broker1	Test 123 Agency	Active	
AB SG Test	St. Louis	Test A Broker1	Test 123 Agency	Active	
AB War ROOM TEST	Virginia Beach	Test A Broker1	Test 123 Agency	Active	

## Group – Manage Your Prospects

This list view shows Quotes for Prospective Groups

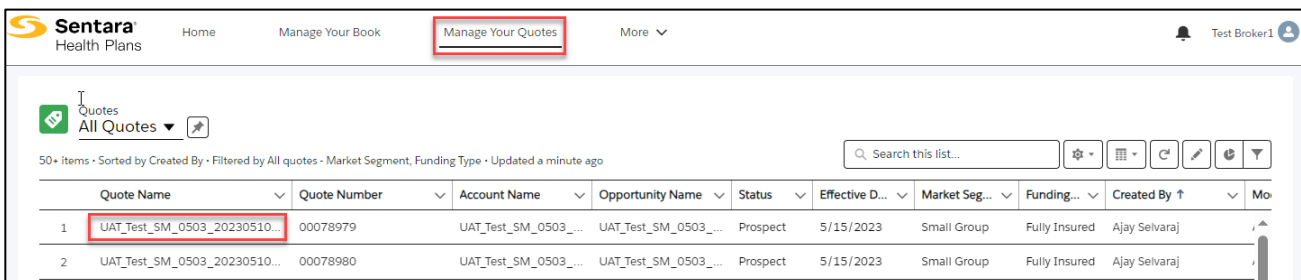


Broker Account Name	City	Primary Producer	Primary Agency	Status	Market Segment
DWM LG Test Group 1	Mechanicsville	Test A Broker1	Test 123 Agency	Active	
AB War ROOM TEST	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
Shred VB	Virginia Beach	Test A Broker1	Test 123 Agency	Active	
Test Dec22	Independence	Test A Broker1	Test 123 Agency	Active	
Test Dec22	Coffeyville	Test A Broker1	Test 123 Agency	Active	
DWM LG Test Group 1	Independence	Test A Broker1	Test 123 Agency	Active	
AB SG Test	St. Louis	Test A Broker1	Test 123 Agency	Active	

## Manage Your Quotes

Click **Manage Your Quotes** and then use the drop-down arrow to select **All Quotes** to view all your quotes. To navigate to a specific quote, click on the **link** listed under the **Quote Name** column.


**\*Note** If you click on the Account Name you won't be taken to the quote screen.



Quote Name	Quote Number	Account Name	Opportunity Name	Status	Effective Date	Market Segment	Funding Type	Created By
UAT_Test_SM_0503_20230510...	00078979	UAT_Test_SM_0503_...	UAT_Test_SM_0503_...	Prospect	5/15/2023	Small Group	Fully Insured	Ajay Selvaraj
UAT_Test_SM_0503_20230510...	00078980	UAT_Test_SM_0503_...	UAT_Test_SM_0503_...	Prospect	5/15/2023	Small Group	Fully Insured	Ajay Selvaraj

On the Quote Detail screen, you will see the quote information, the status of the quote and be able to perform quote actions. Click the **Related Tab** to view the quote line items.




**Quote**  
 Test 12/1/2021 Annie Broker

Generate Proposal   Clone Quote   Close Quote

Quote Number 00059470	Expiration Date 11/30/2022	Opportunity ID <a href="#">Test 12/1/2021</a>	Status Final Review	Type New Business
--------------------------	-------------------------------	--	------------------------	----------------------

✓

Final Review

Closed

Sold


**Details**   Related

Quote Number 00059470	Effective Date 12/1/2021
Quote Name Test 12/1/2021 Annie Broker	Expiration Date 11/30/2022
Opportunity Name <a href="#">Test 12/1/2021</a>	Renewal Month December

## Manage Your Applications

Click **Manage Your Applications** to view all your applications. Click on the link listed in the column under the **Application Name** to access the application's page.

**\*Note** If you click on the Account Name you won't be taken to the Application screen. Be sure to click on the Application Name. The Application Name is system generated.



**Applications**  
 All ▾

New   Printable View

9 items • Sorted by Account • Filtered by All applications • Updated a few seconds ago

<input type="checkbox"/>	Account ↑ ▾	Application Name ▾	Status ▾	Opportunity ▾	Quote ▾	Broker Account ▾	Created Date ▾
1	<input type="checkbox"/> ABC test 09/17	<a href="#">a1r0r000001eqYs</a>	In Progress	ABC test 09/17 10/1...	ABC test 09/17 10/1...	ABC test 09/17	9/17/2021, 6:31 AM
2	<input type="checkbox"/> ABC Test 9-2-21 SG C...	<a href="#">a1r0r000001epSI</a>	In Progress	ABC Test 9-2-21 SG C...	ABC Test 9-2-21 SG C...	ABC Test 9-2-21 SG C...	9/2/2021, 5:41 AM
3	<input type="checkbox"/> ABC Test Aug 18	<a href="#">a1r0r000001ep4p</a>	Application Uploaded	ABC Test Aug 18 12/1...	ABC Test Aug 18 202...	ABC Test Aug 18	8/25/2021, 11:01 AM
4	<input type="checkbox"/> ABC Test Aug 20	<a href="#">a1r0r000001eoOq</a>	In Progress	ABC Test Aug 20 12/1...	ABC Test Aug 20 12/...	ABC Test Aug 20	8/20/2021, 4:00 AM
5	<input type="checkbox"/> American Dream Lan...	<a href="#">a1r0r000001ewKI</a>	Membership Uploaded	American Dream Lan...	American Dream Lan...	American Dream Lan...	10/6/2021, 3:20 AM
6	<input type="checkbox"/> American Dream Lan...	<a href="#">a1r0r000001ewKc</a>	Submitted	American Dream Lan...	American Dream Lan...	American Dream Lan...	10/6/2021, 3:22 AM
7	<input type="checkbox"/> Test	<a href="#">a1r0r000001fNBj</a>	In Progress	Test 12/1/2021	Test 12/1/2021 Anni...	Test	11/2/2021, 1:59 PM
8	<input type="checkbox"/> Test Group	<a href="#">a1r0r000001fMY6</a>	In Progress	Test Group 11/1/2021	Test Group 11/1/202...	Test Group	10/28/2021, 7:20 AM
9	<input type="checkbox"/> Test2	<a href="#">a1r0r000001fMV...</a>	Application Uploaded	Test2 12/1/2021	Test2 12/1/2021 An...	Test2	10/27/2021, 12:19 PM

On the application detail screen, you will be able to view all information related to the application, view and upload Required Application Documents and perform application activities if applicable.


 Application  
 a1r0r000001eqYs

Submit Application   Add Group Classes   Add Subgroup ▼

In Progress   Application Uploaded   Rejected   Submitted   Membership Uploaded   Membership Approved

**Key Fields**

Mode of Eligibility ⓘ

[Edit](#)   **Guidance for Success**

1. Select Mode of Eligibility  
 2. Go to required application documents tab and submit the required documents  
 3. Specify the group class by clicking the "Add Group Class" button  
 4. Specify the subgroup structure by clicking the "Add Subgroup" button  
 5. Once complete, click the "Submit Application" button for your group's application to be processed

**Details**   Required Application Documents

Application Name  
 a1r0r000001eqYs


Account  
 ABC test 09/17

Status  
 In Progress

Broker Account  
 ABC test 09/17

## Manage Your Enrollment

Click **Manage Your Enrollment** to view all your accounts. Click on the **Account Name** to view an account.


 Accounts Enrollment ▼ ⓘ

New   Printable View

22 items • Sorted by Account Name • Filtered by All accounts - Broker Enrollment Enabled? • Updated a few seconds ago

	Account Name ↑	Account Site	Billing State/...	Phone	Type	Account Owner ...
1	Advance Safety Equipment Company		Virginia	(757) 248-8802	Customer	muser
2	Blue Ridge Regional Jail Authority		Virginia	434-847-3100 Ext. 210	Customer	muser

## Manage Your Leads

Click **Manage Your Leads** to view all your leads. Click on the **Lead Name** to view a lead.


 Leads All Open Leads ▼ ⓘ

New   Send List Email   Printable View

11 items • Sorted by Name • Filtered by All leads - Lead Status • Updated a minute ago

	<input type="checkbox"/> Name ↑	Company	Phone	N...	Sales Rep	Lead ...	Created Date	Email
1	<input type="checkbox"/> Andy Smith	Universal Technologies	(555) 555-1212			Open	2/25/2021, 7:34 PM	info@salesforce.com
2	<input type="checkbox"/> Demo 2	Demo2	(777) 777-7777 Ext. 777777	2-24		Open	5/3/2022, 4:59 PM	demo2@test.com

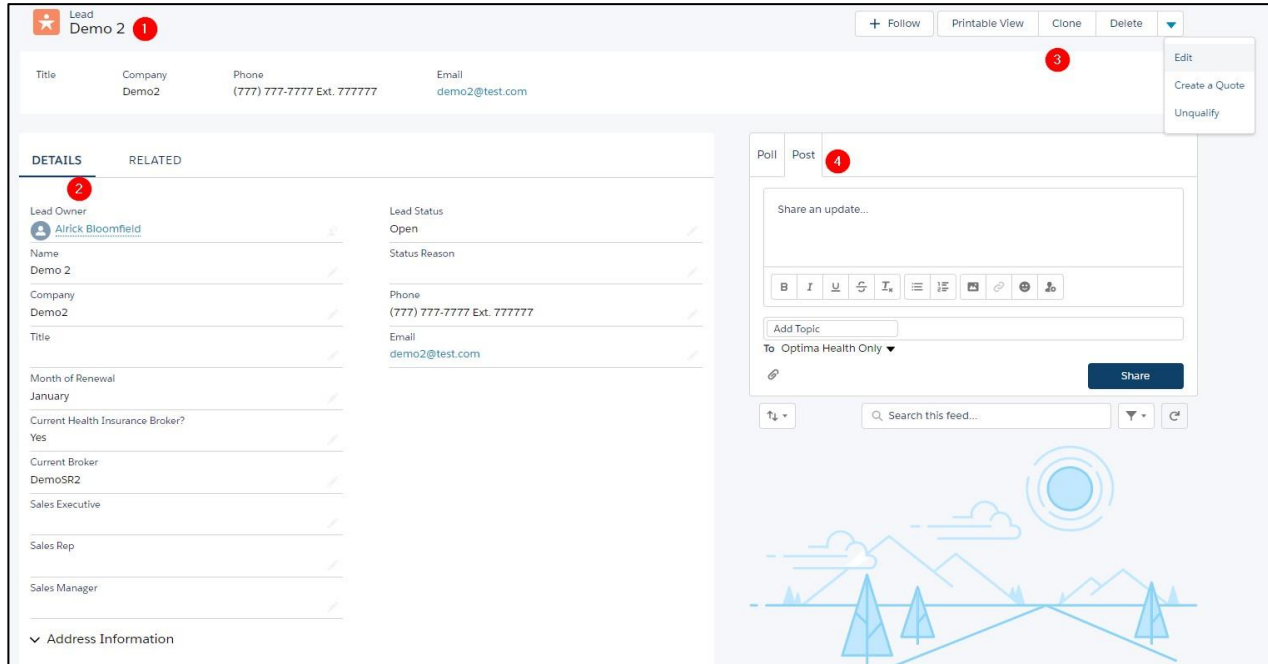
On the Lead Details screen, you can access a variety of information and functions.

You can:

1. view high level demographic details
2. view and edit specific information related to the lead. To make an edit to a field, hover over the field and click the pencil icon on the right of the field. Remember to click **Save** after making your edits
3. perform a variety of functions related to the lead including **Follow, Clone, Delete, Edit,**

### Create a Quote, Unqualify viewing a Printable View

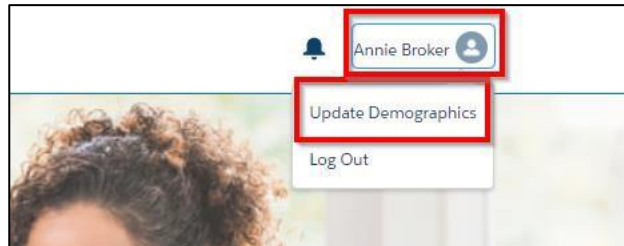
4. make a post/share an update related to the Lead. Select who to send the update to and click **Share**



The screenshot displays the 'Lead Demo 2' profile in the Sentara Health Plans system. The interface includes a top navigation bar with options like '+ Follow', 'Printable View', 'Clone', and 'Delete'. A dropdown menu for 'Demo 2' shows options: 'Edit', 'Create a Quote', and 'Unqualify'. The main content area is divided into 'DETAILS' and 'RELATED' tabs. The 'DETAILS' tab shows lead information such as Name (Demo 2), Company (Demo2), Phone ((777) 777-7777 Ext. 777777), Email (demo2@test.com), and Lead Status (Open). The 'RELATED' tab shows a list of related leads. On the right, the 'Post' form is visible, allowing users to 'Share an update...' with a text input field, a rich text editor toolbar, and a 'Share' button. The background features a stylized illustration of a mountain range and trees.

## Update Demographics

To update your account demographics, click on the grey avatar in the upper right-hand corner on your homepage. Click **Update Demographics**. Fill out the information and click **Update**.



### Update Information

Please confirm the information below is updated and accurate

▼ Update Phone Number

Phone Number

▼ Update Address and Other Information

Update Address, Agency, Email, Last Name or Tax ID ⓘ

## Access Dashboards

There are a variety of dashboards available from your homepage.

Current dashboards include:

- Status of New Business
- Status of Renewal Business
- Retention Rate of Brokers
- Renewals by Account, and
- Quotes Converted to Active Enrollment

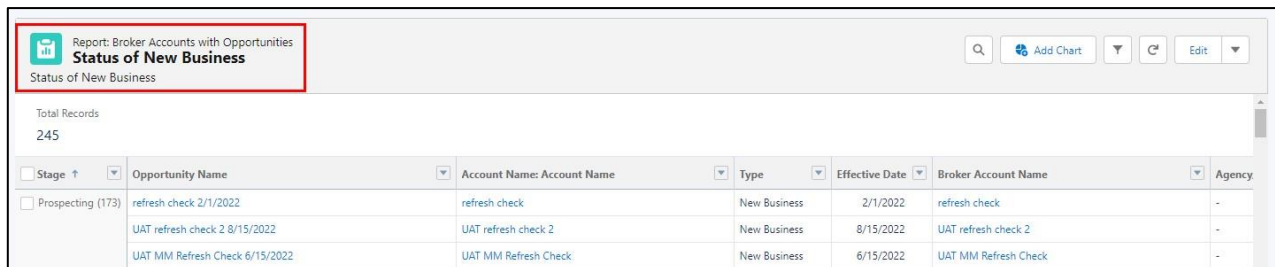
All dashboards are:

1. expandable to a larger view
2. interactive; hover over a graphical element to learn more
3. viewable on a new screen (clicking “View Report” will lead you to the detailed information; see example below)
4. refreshable

Note: Click the arrow to the right of the Refresh button to download an image of all your dashboards.



Below is the detailed report generated upon clicking **View Report (Status of New Business)** below the associated dashboard. From this page you can access a variety of functions.



**Report: Broker Accounts with Opportunities**  
**Status of New Business**  
 Status of New Business

Total Records: 245

Stage	Opportunity Name	Account Name: Account Name	Type	Effective Date	Broker Account Name	Agency
Prospecting (173)	refresh check 2/1/2022	refresh check	New Business	2/1/2022	refresh check	-
	UAT refresh check 2 8/15/2022	UAT refresh check 2	New Business	8/15/2022	UAT refresh check 2	-
	UAT MM Refresh Check 6/15/2022	UAT MM Refresh Check	New Business	6/15/2022	UAT MM Refresh Check	-