Broker Homepage, Dashboard and Navigation Overview

Table of Contents

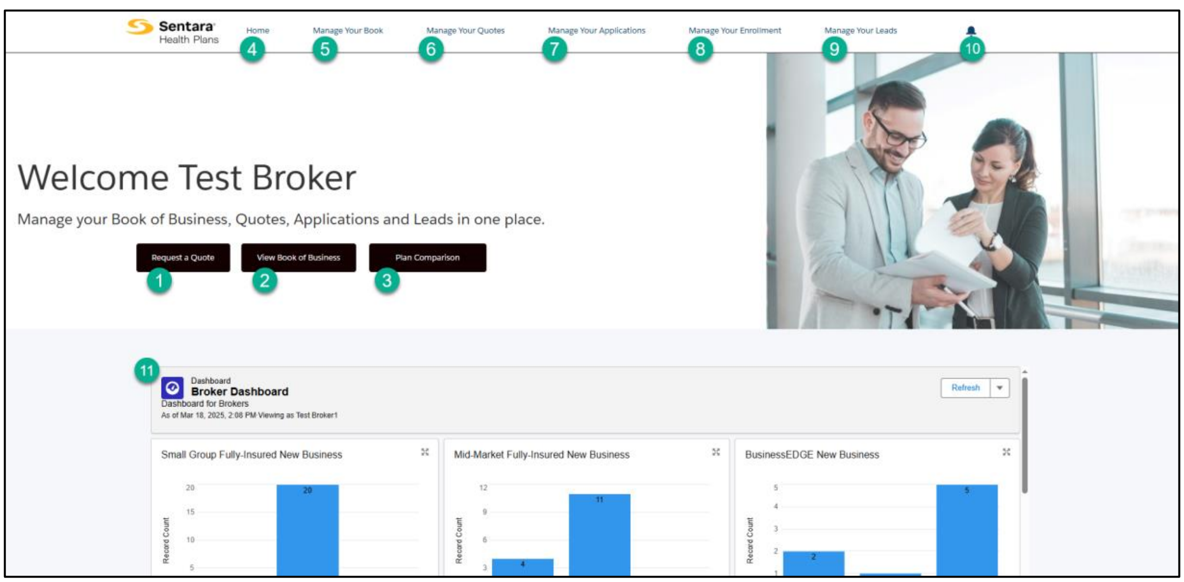
Purpose

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:

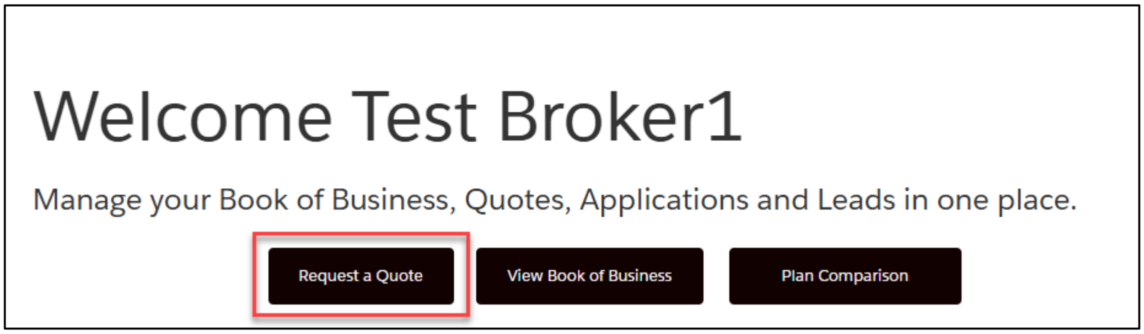
1. Request a quote
2. View Book of Business
3. Plan Comparison
4. Home
5. Manage Your Book
6. Manage Your Quotes
7. Manage Your Applications
8. Manage Your Enrollment
9. Manage Your Leads
10. Notification Bell
11. View Dashboard Reports



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.

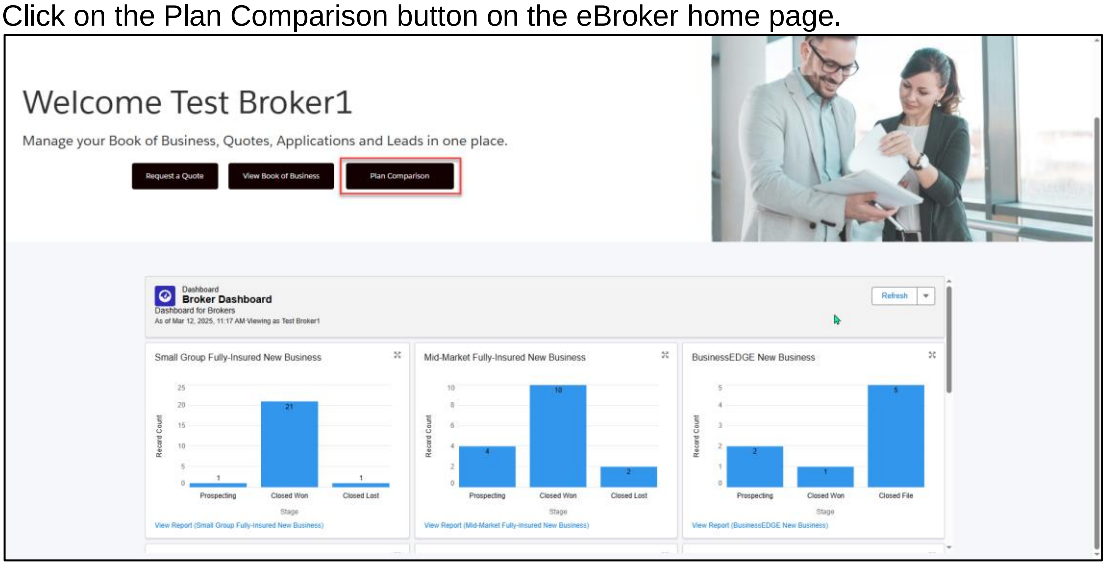
Please see the Quoting User guides for details on how to complete a quote.



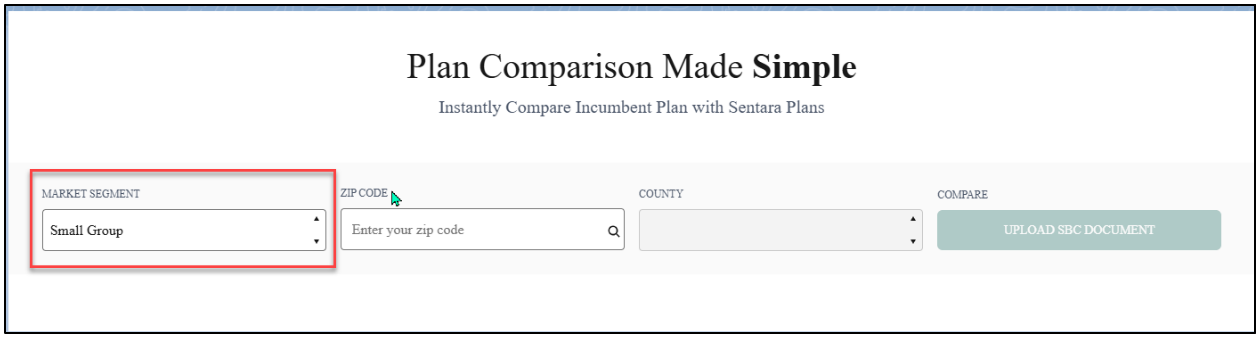
Plan Comparison

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.



Enter the following information:

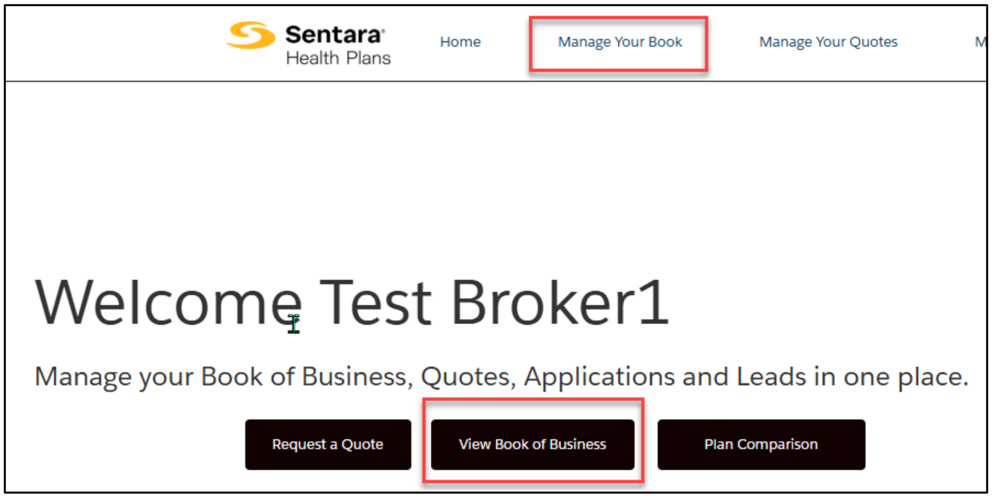
- **Market Segment** – Select the Market Segment from the dropdown menu.
- **Zip Code** – Type the zip code and then select it from the display list.
- **County Field** –Select the County from the display list.
    - If a single county matches the zip code that was entered, it automatically fills in 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".

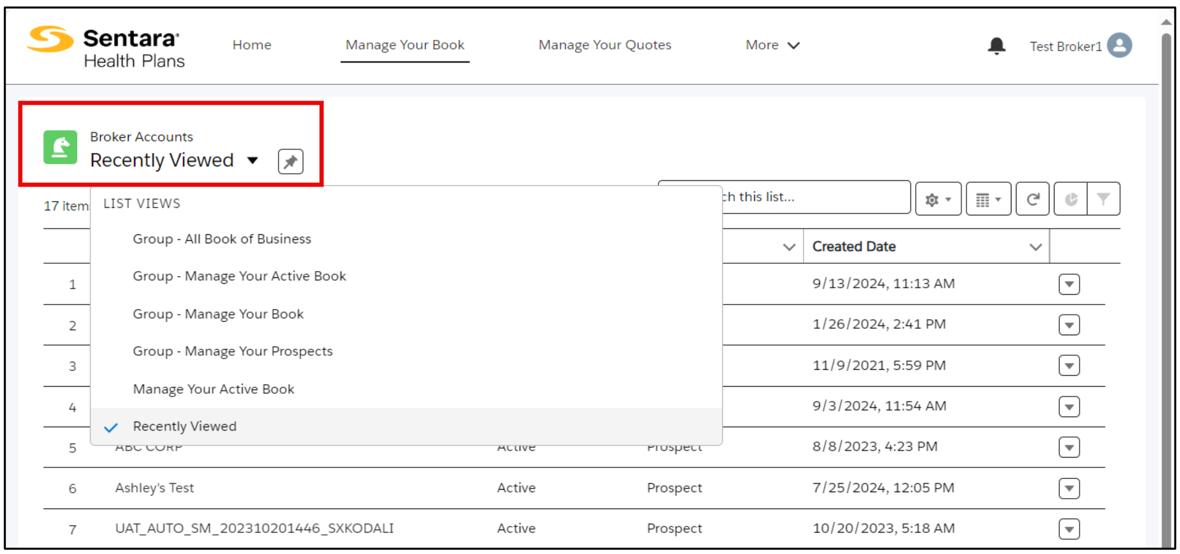
Navigation Tip

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.

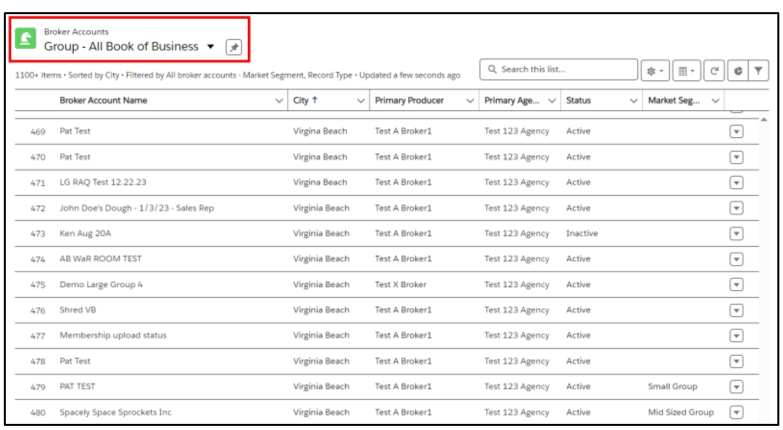
Recently Viewed

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.



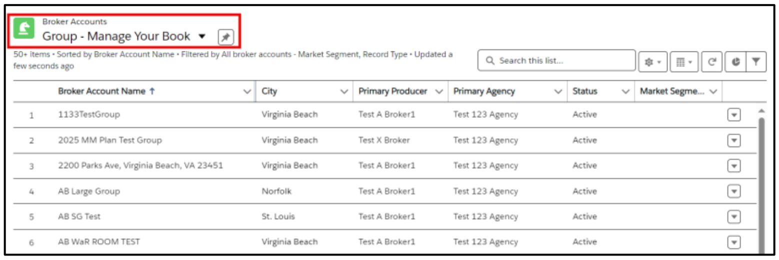
Group - All Book of Business

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



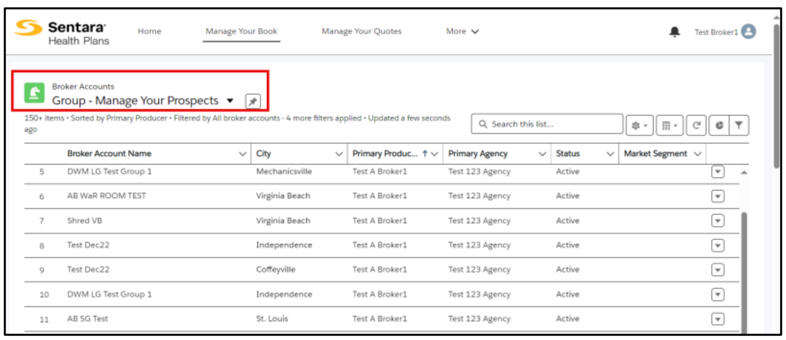
Group - Manage Your Book

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



Group – Manage Your Prospects

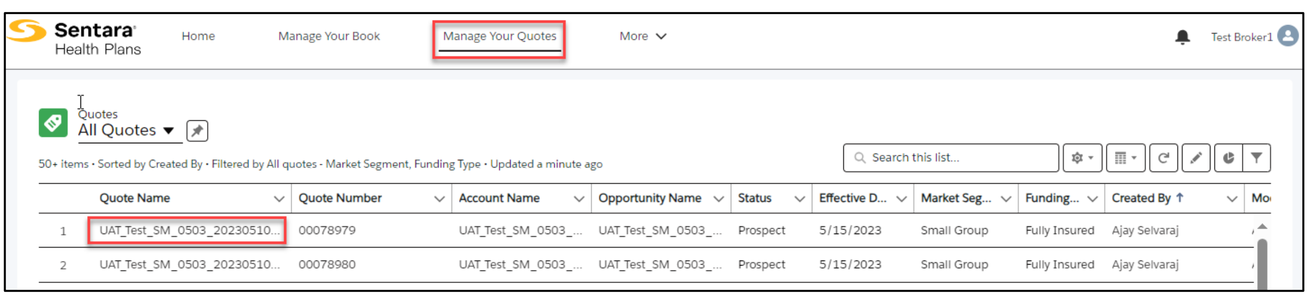
This list view shows Quotes for Prospective Groups



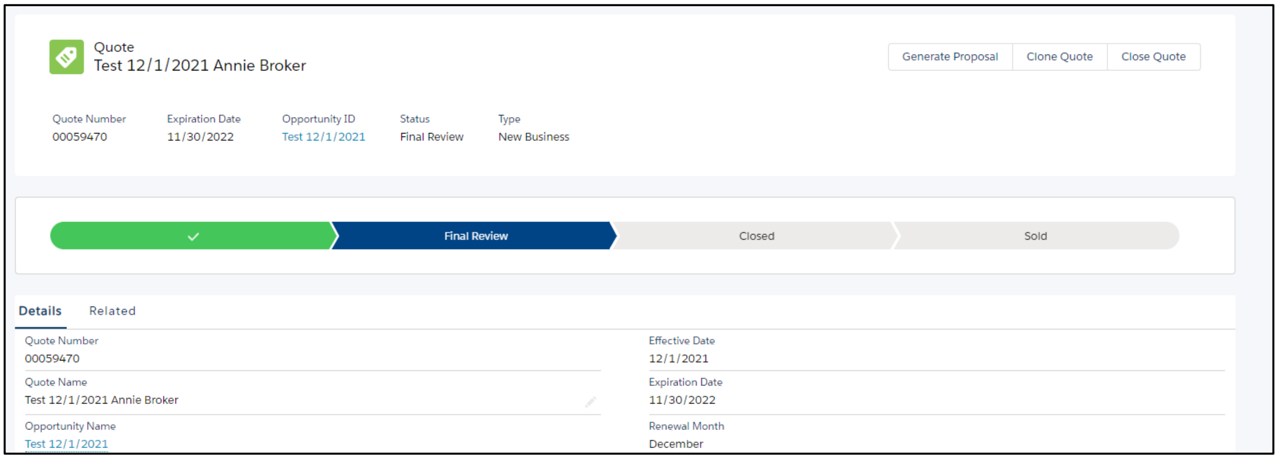
Manage Your Quotes

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.



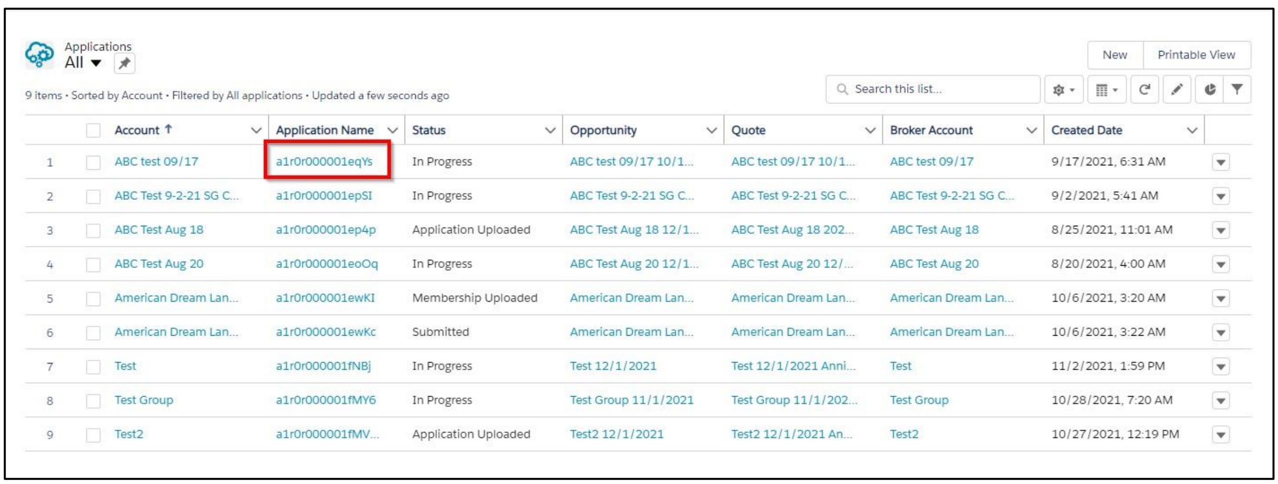
On the Quote Detail screen, you will see the quote information, the status of the quote and be able to perform quote actions. Click the **Related Tab** to view the quote line items.



Manage Your Applications

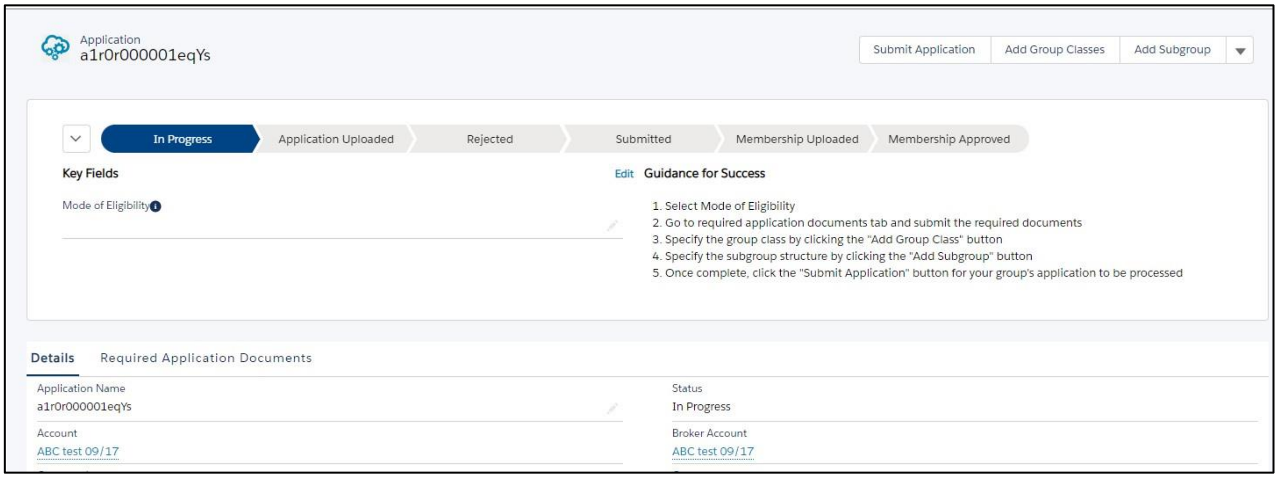
Click **Manage Your Applications** to view all your applications. Click on the link listed in the column under the **Application Name** to access the application's page.

***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.



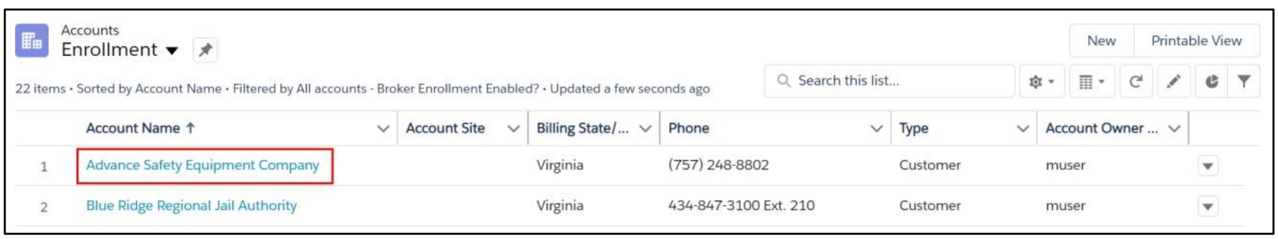
	Account	Application Name	Status	Opportunity	Quote	Broker Account	Created Date
1	ABC test 09/17	a1r0r000001eqYs	In Progress	ABC test 09/17 10/1...	ABC test 09/17 10/1...	ABC test 09/17	9/17/2021, 6:31 AM
2	ABC Test 9-2-21 SG C...	a1r0r000001epSI	In Progress	ABC Test 9-2-21 SG C...	ABC Test 9-2-21 SG C...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



Manage Your Enrollment

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



Manage Your Leads

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

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

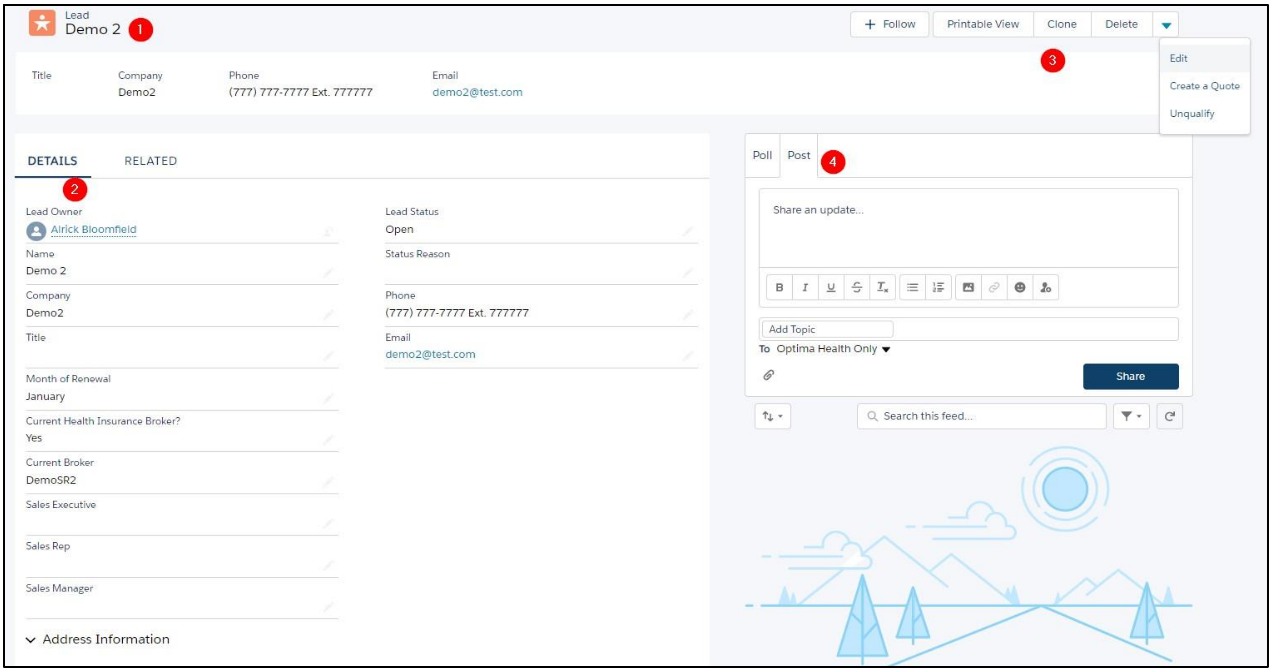
You can:

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,**

Sentara Health Plans

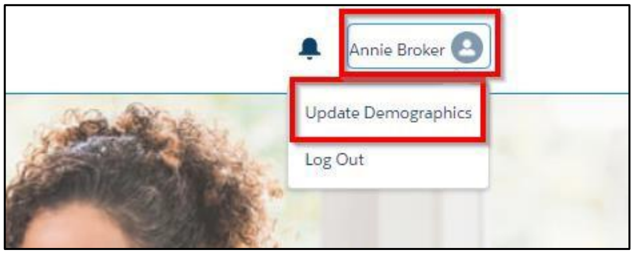
Create a Quote, Unqualify viewing a **Printable View**

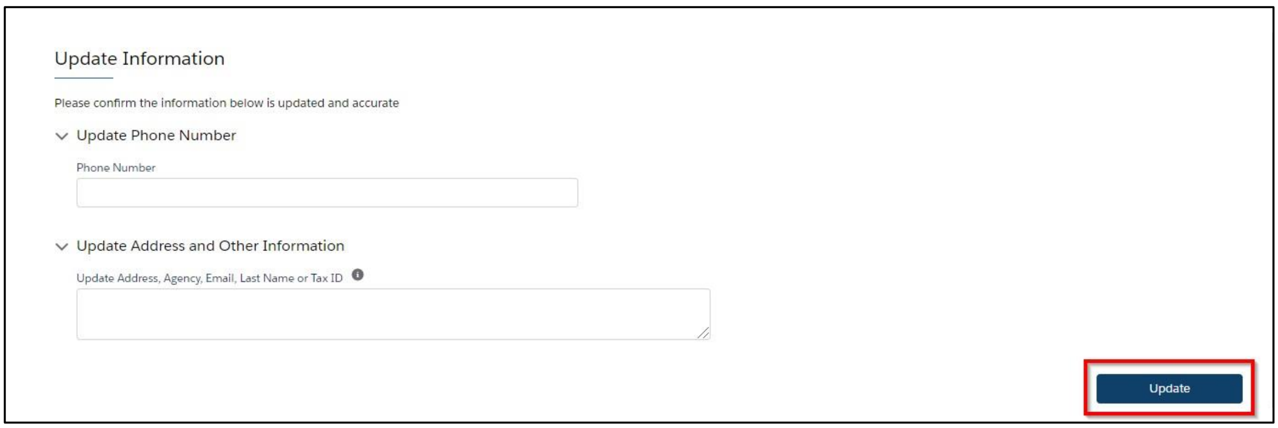
4. make a post/share an update related to the Lead. Select who to send the update to and click **Share**



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**.





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.