Homepage Overview User Guides – For Brokers

Optima Health

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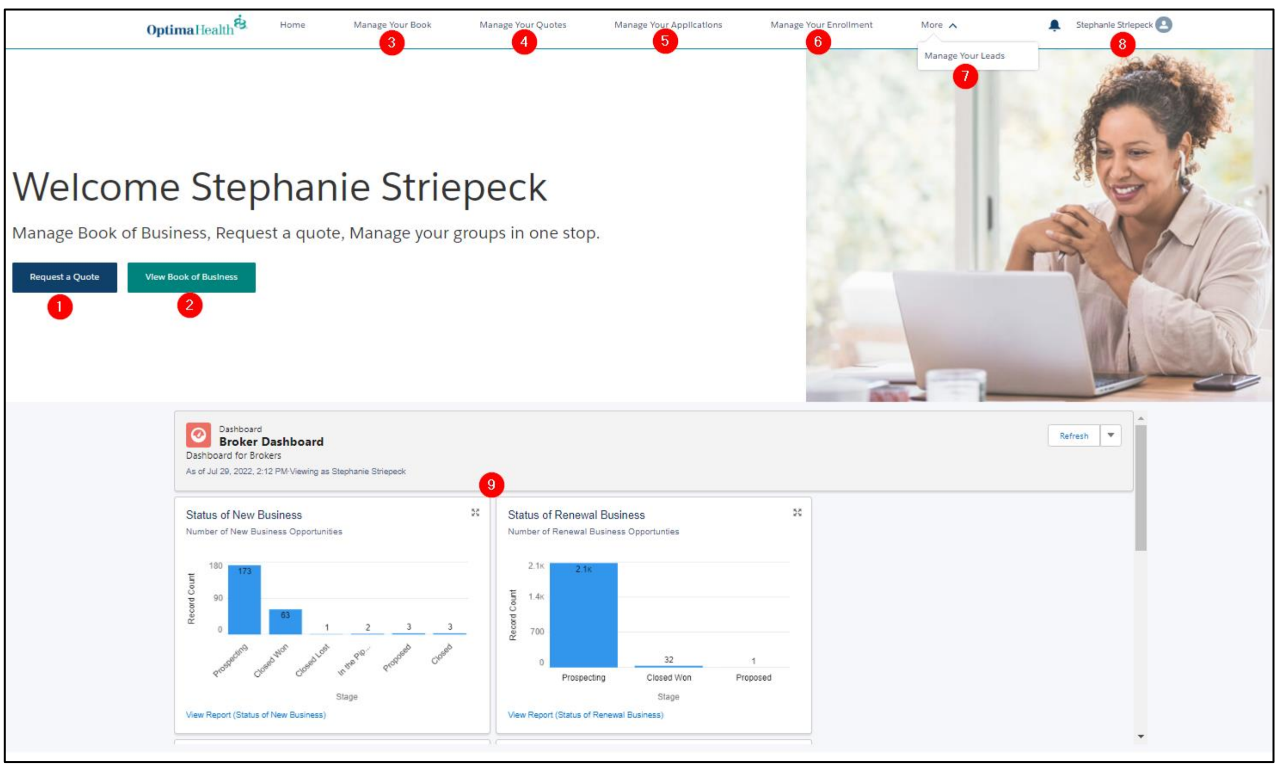
Purpose

The purpose of this user guide is to provide an overview of the eBroker homepage.

Your Homepage

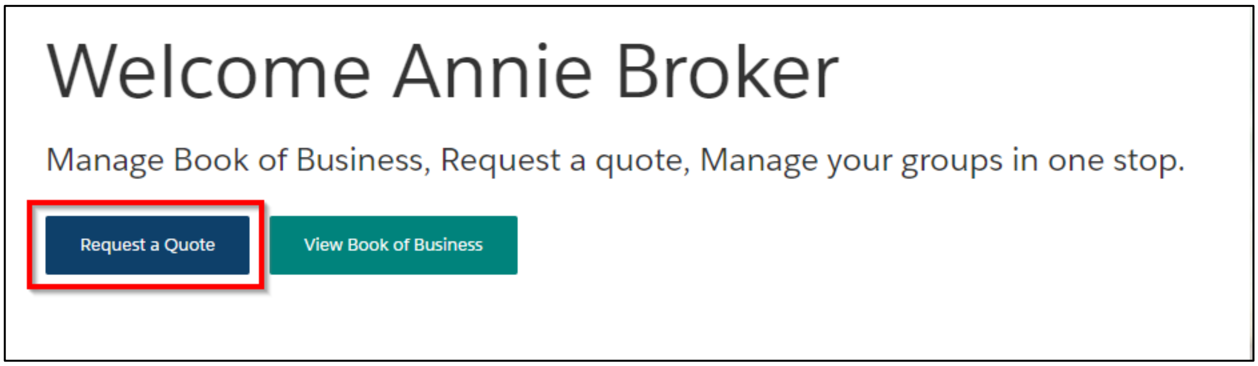
From your eBroker homepage, you can perform the following actions:

1. request a quote
2. view your book of business
3. manage your book of business
4. manage your quotes
5. manage your applications
6. manage your enrollment
7. manage your leads
8. update demographics
9. view and access your dashboards



Request a Quote

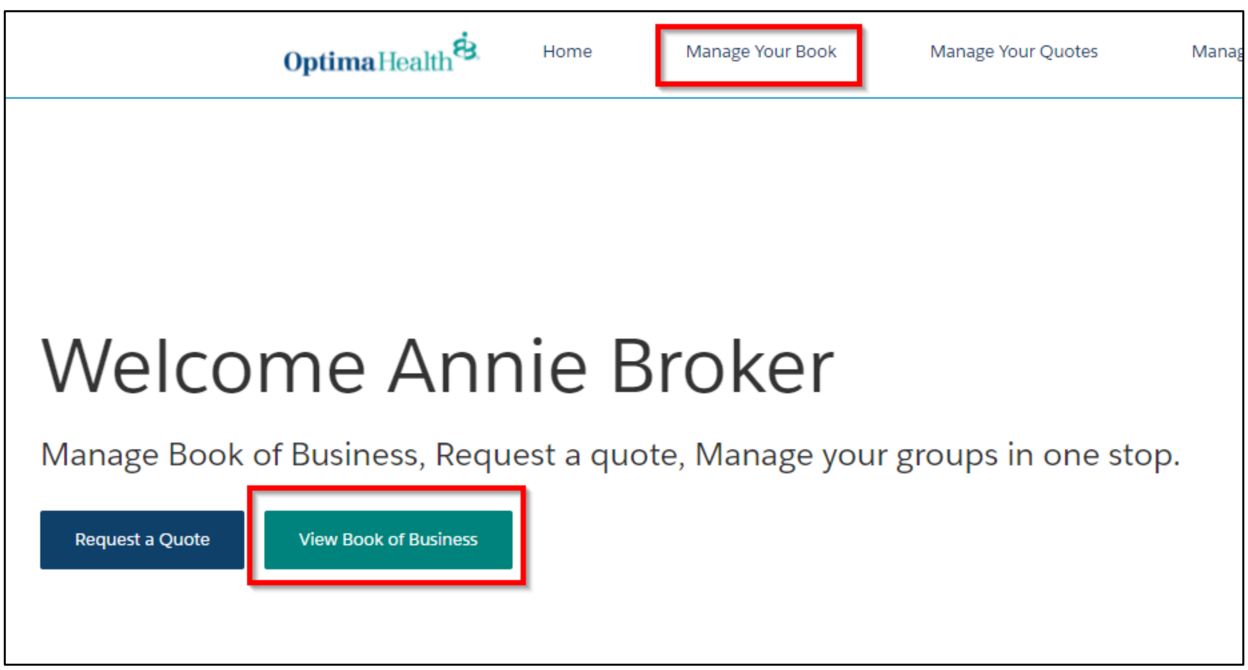
From the homepage of your portal, click on **Request a Quote** to begin a new quote. You can use this button to request a quote for Small Group, Mid-Market and Level Funded.



Please refer to the *Quote Process User Guides* for the quoting process.

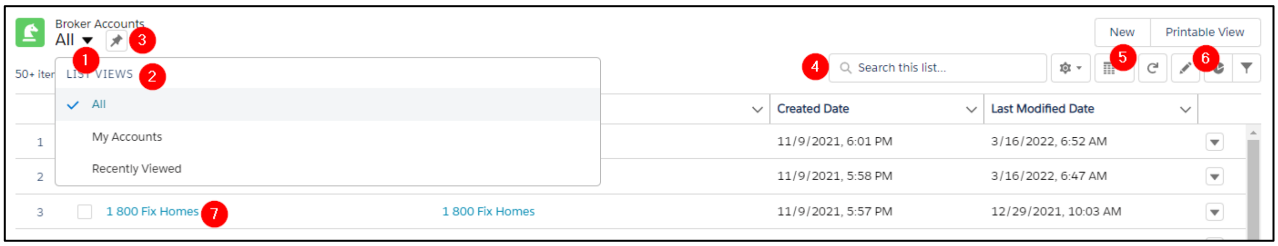
View Book of Business

There are 2 ways you can view your Book of Business from your homepage. You can click **View Book of Business** or **Manage Your Book**.



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

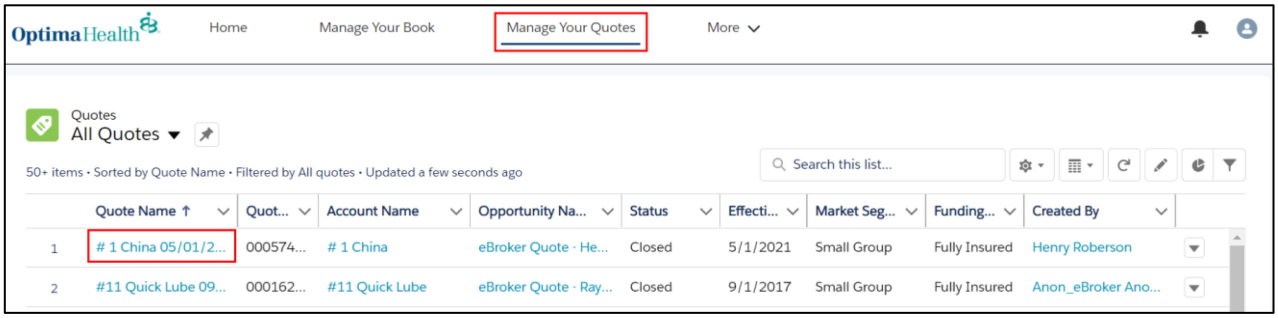
1. adjust your view of accounts by clicking on the arrow by the account list
2. select which list of accounts you would like to view
3. pin a list by clicking on the pushpin image
4. search the list by utilizing the *Search this list* field
5. create a new account by clicking **New**
6. generate a printable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



For additional Book of Business functionalities, please refer to the *Book of Business User Guide* and *Member Enrollment for Brokers User Guide*.

Manage Your Quotes

Click **Manage Your Quotes** to view all your quotes. To view a specific quote, click on the **Quote Name.**



On the Quote Detail screen, you will see the quote information, the status of the quote and be able to perform quote actions.

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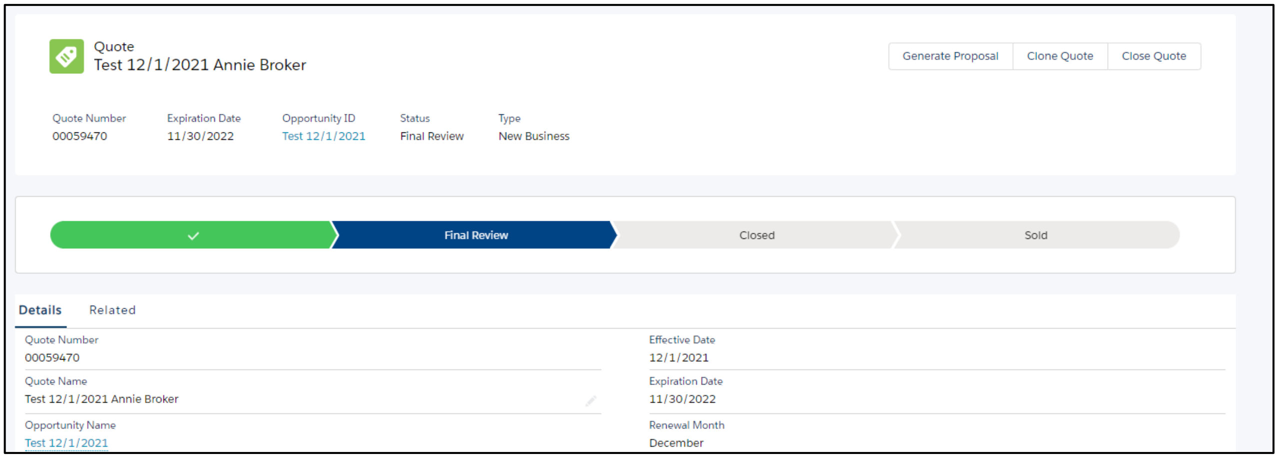
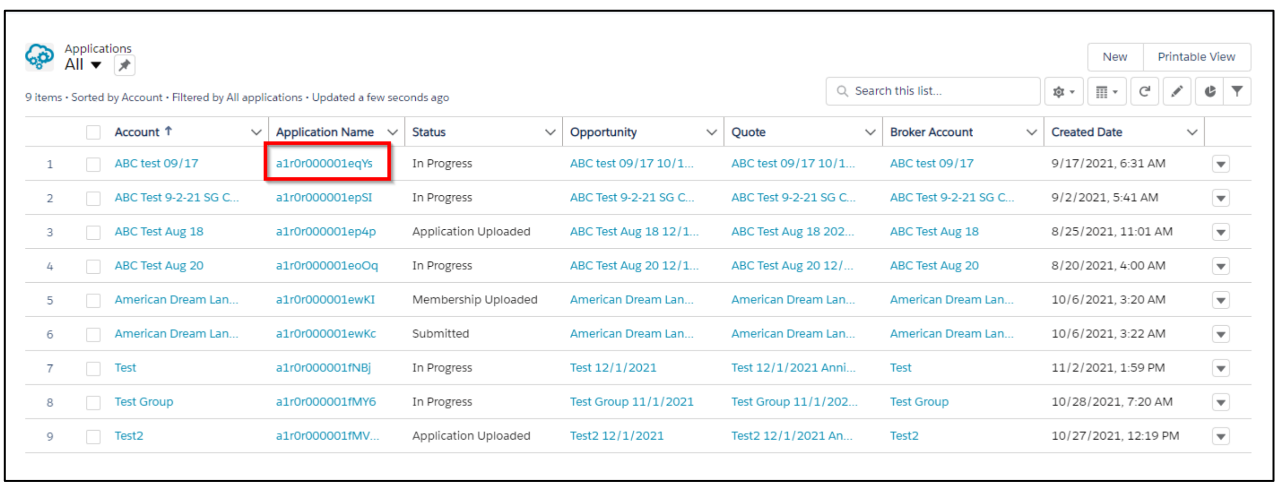


Manage Your Applications

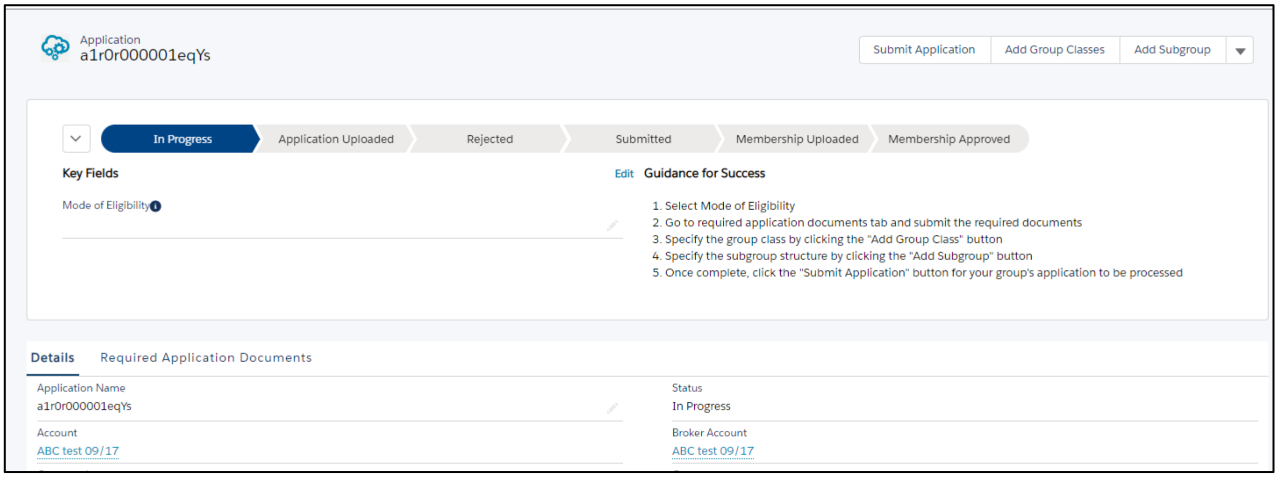
Click **Manage Your Applications** to view all your applications. Click on the **Application Name** to access the application's page.

Note: 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

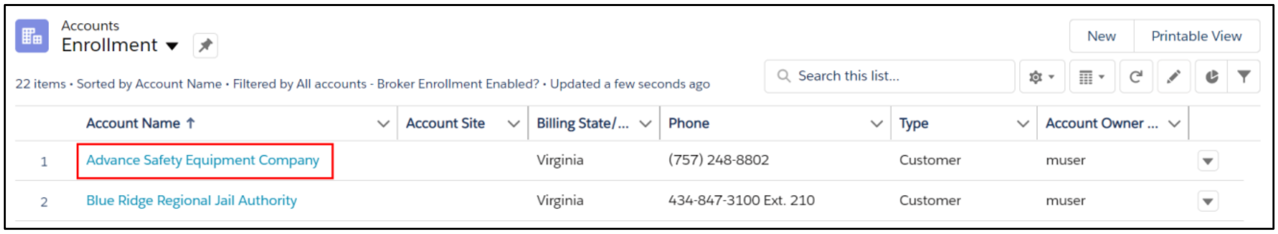
On the application detail screen, you will be able to view all information related to the application, view and upload Required Application Documents and perform application activities if applicable.



To learn more about managing your applications please refer to the *Application Process for Brokers User Guide*.

Manage Your Enrollment

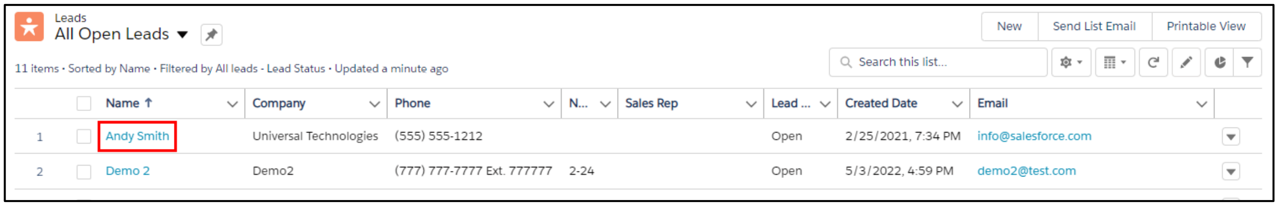
Click **Manage Your Enrollment** to view all your accounts. Click on the **Account Name** to view an account.



To learn more about managing enrollment please refer to the *Member Enrollment for Brokers User Guide*.

Manage Your Leads

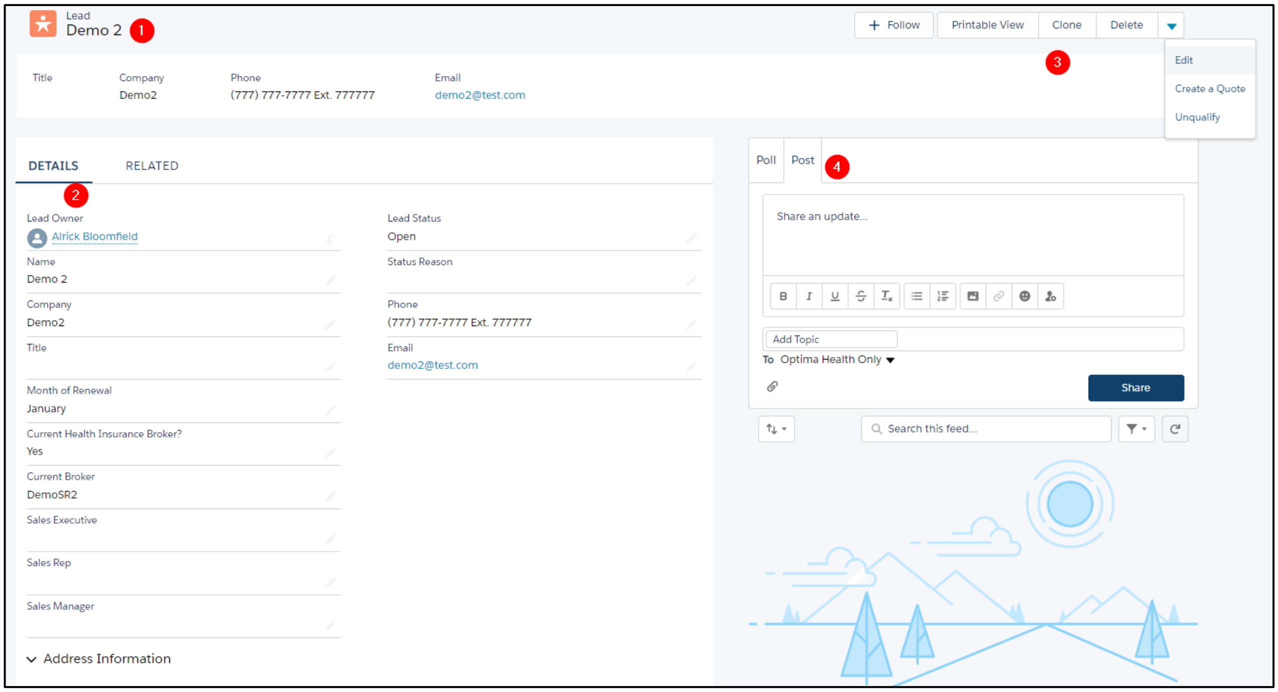
Click **Manage Your Leads** to view all your leads. Click on the **Lead Name** to view a lead.



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

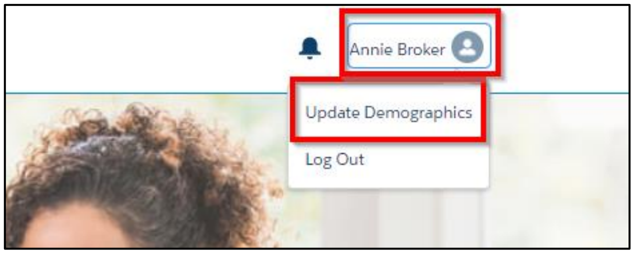
You can:

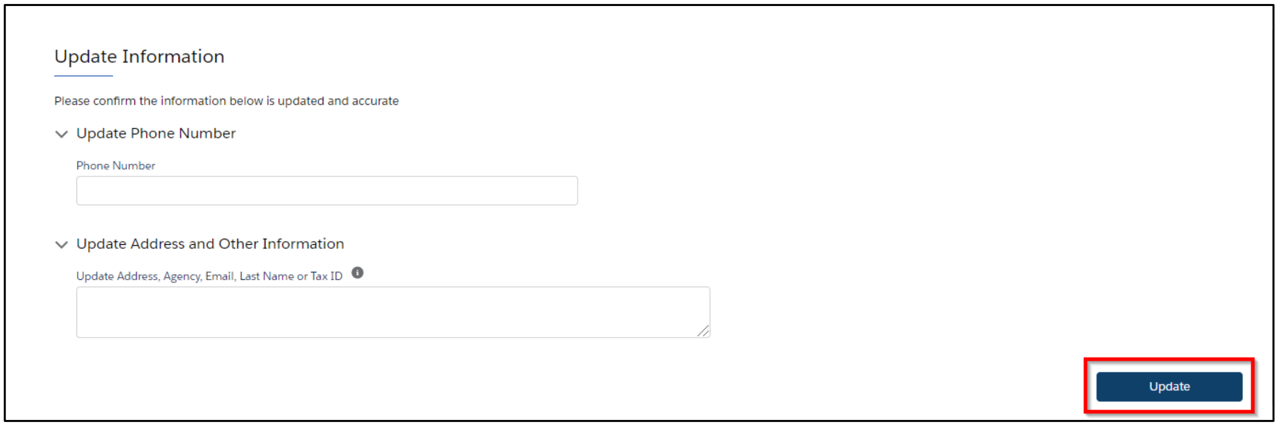
1. view high level demographic details
2. view and edit specific information related to the lead. To make an edit to a field, hover over the field and click the pencil icon on the right of the field. Remember to click **Save** after making your edits
3. perform a variety of functions related to the lead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

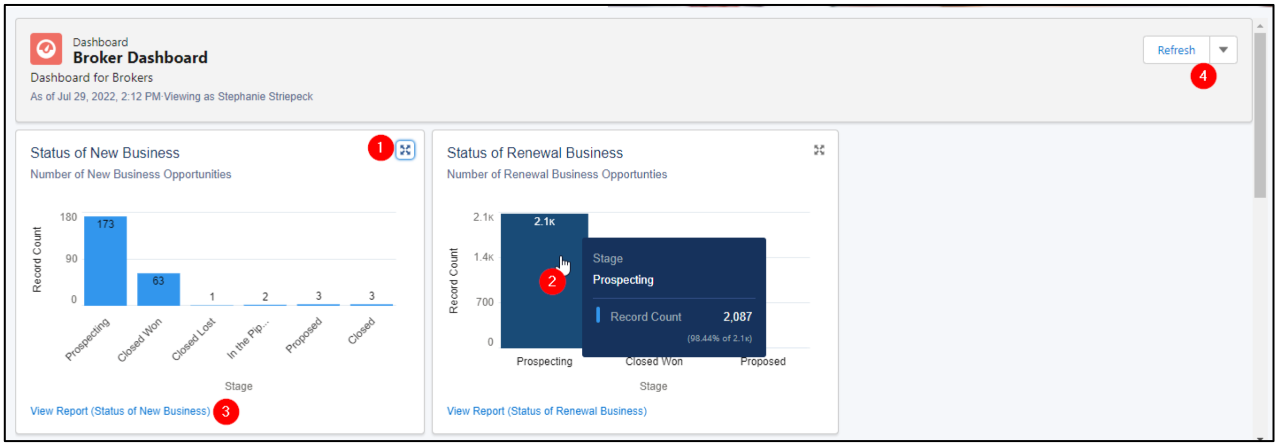
Current dashboards include:

- 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.