

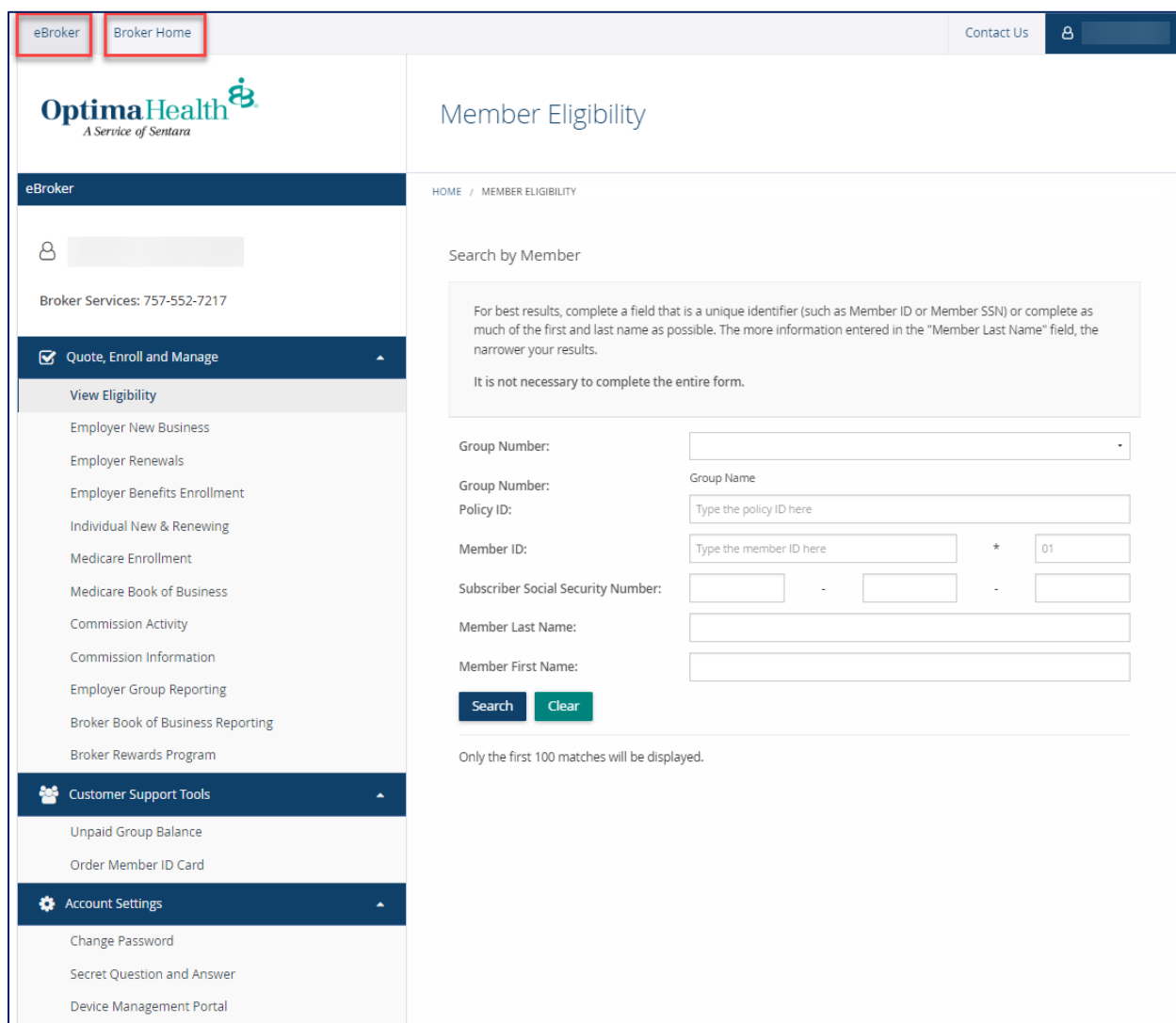
**Broker Portal Overview**  
**[Optimahealth.com/brokers](https://Optimahealth.com/brokers)**

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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 eBroker portal interface. At the top, there are navigation tabs for 'eBroker' and 'Broker Home', and a 'Contact Us' link. The main header features the OptimaHealth logo and the page title 'Member Eligibility'. A left sidebar contains a navigation menu with categories like 'Quote, Enroll and Manage', 'Customer Support Tools', and 'Account Settings'. The main content area is titled 'Search by Member' and includes a search form with fields for Group Number, Policy ID, Member ID, Subscriber Social Security Number, Member Last Name, and Member First Name. A 'Search' button and a 'Clear' button are located at the bottom of the form. A note states: '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.' Below the form, it says 'Only the first 100 matches will be displayed.'

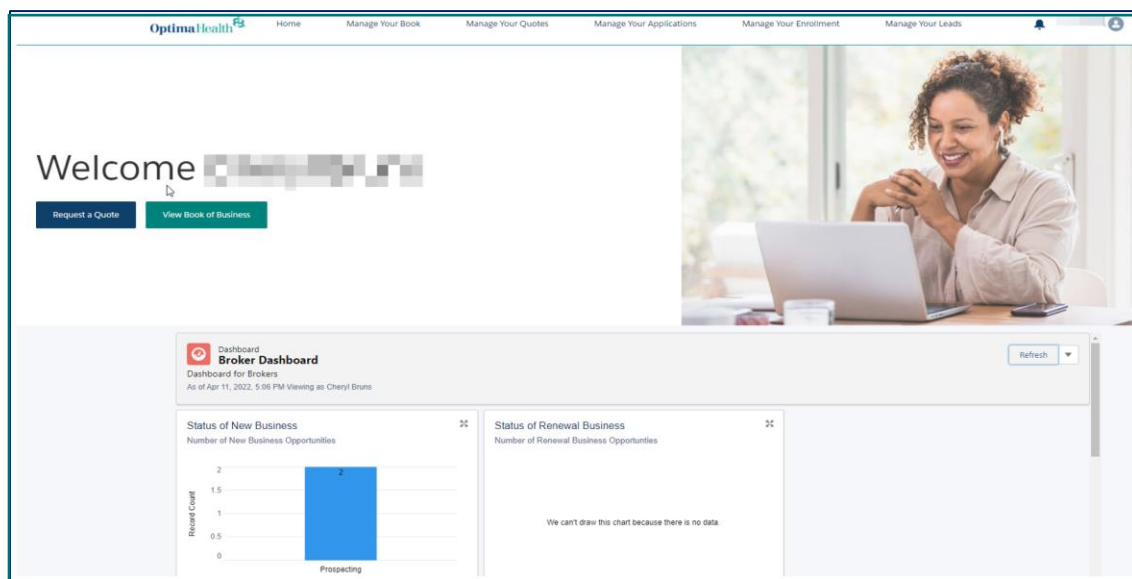
## Your Homepage

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

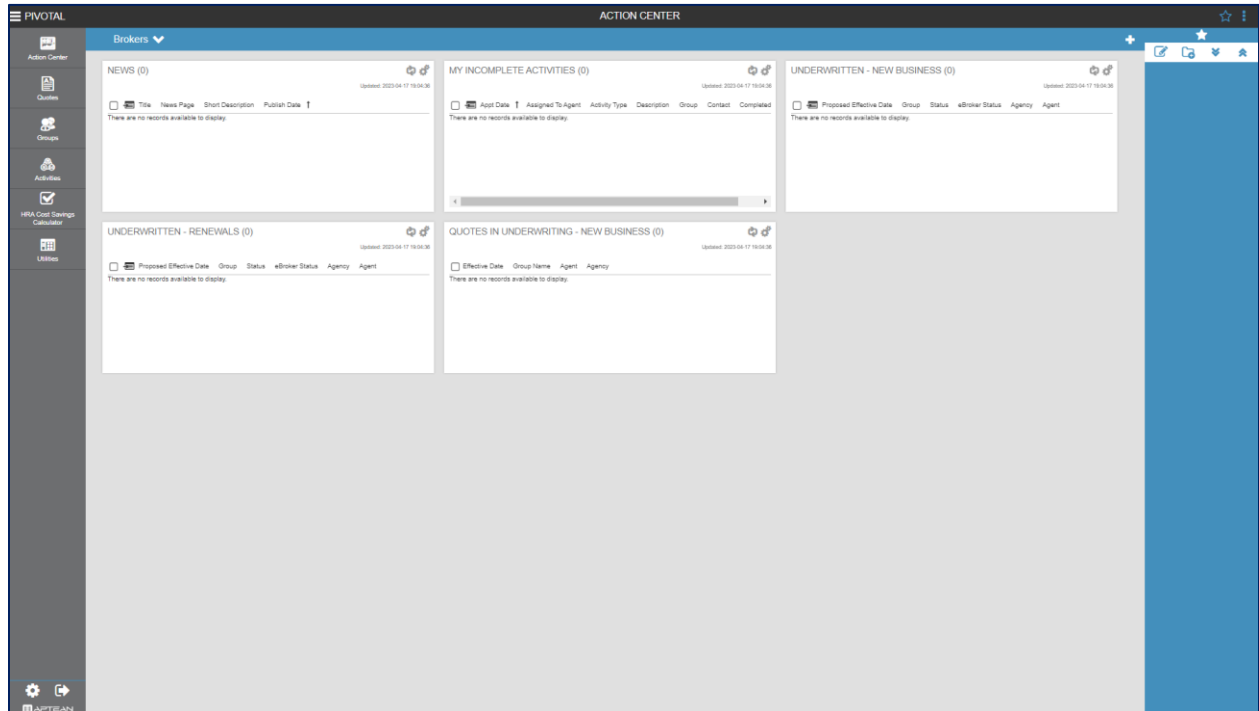
## Employer New Business

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.



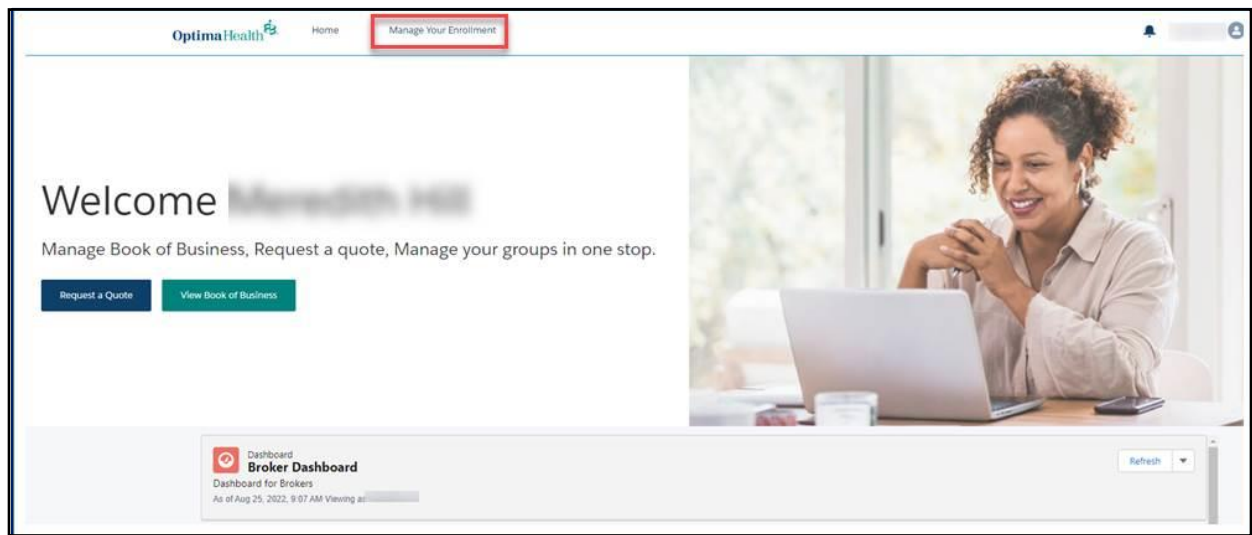
## Employer Renewals

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



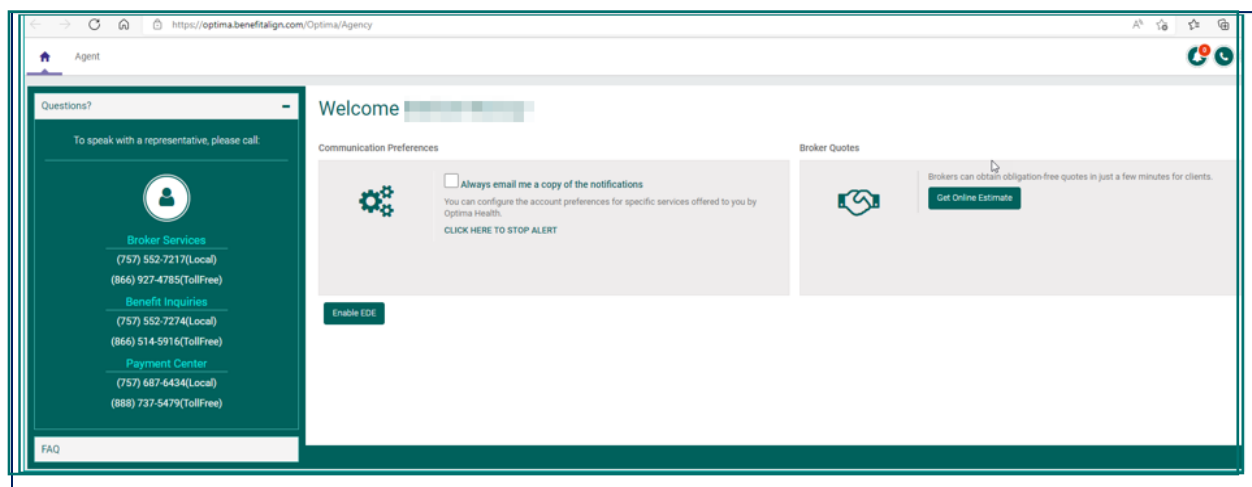
## Employer Benefits Enrollment (e3 Web Enrollment)

If you manage the enrollment for your group, here you are able to view and make changes to member enrollment by clicking Manage Your Enrollment.



## Individual New & Renewing

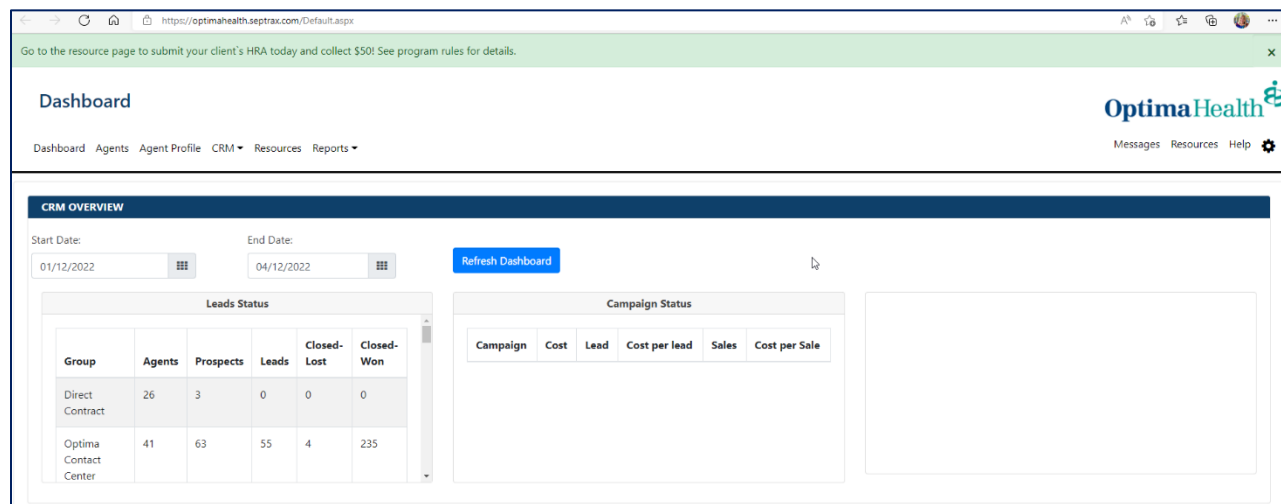
If you sell Individual Product Plans, here you can request quotes for your clients and manage your communication preferences.



## 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.



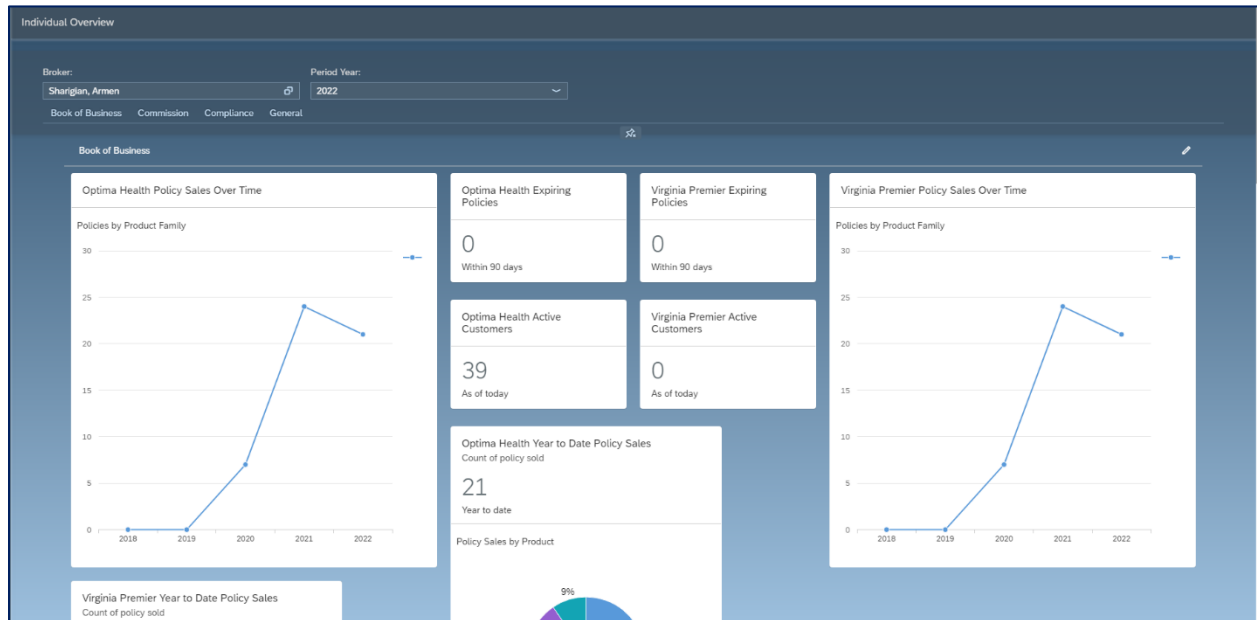
The screenshot shows the OptimaHealth CRM Dashboard. At the top, there is a navigation bar with the OptimaHealth logo and links for Messages, Resources, and Help. Below the navigation bar, there is a "CRM OVERVIEW" section. This section includes a "Start Date" field set to 01/12/2022 and an "End Date" field set to 04/12/2022, with a "Refresh Dashboard" button. The main content area is divided into two tables: "Leads Status" and "Campaign Status".

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

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.

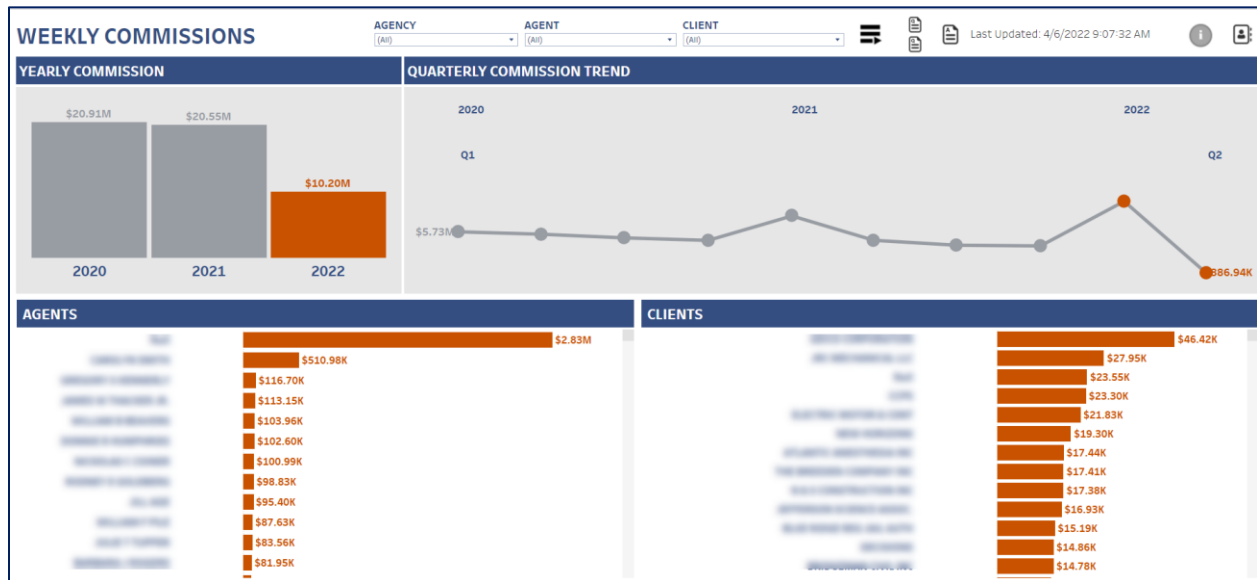
04/04/22 OPTIMA HEALTH REMIT FOR [REDACTED] PAGE: 1  
 VENDOR: [REDACTED] CONTROL#: 12#5604993  
 CHECK#: 2728227

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 [REDACTED]								\$616.32
REMIT TOTAL: \$616.32								



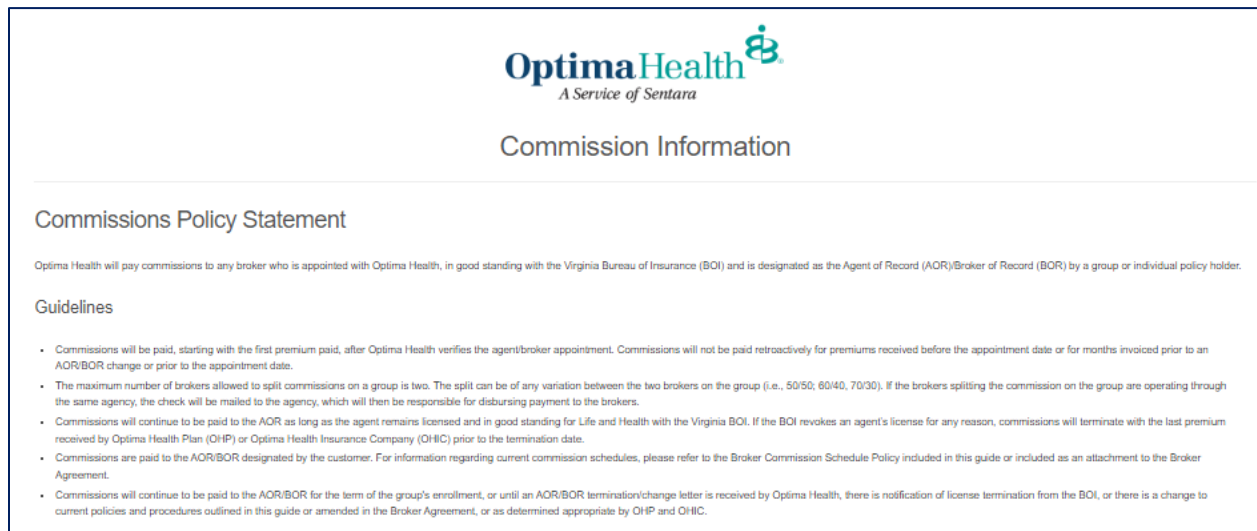
## Commission Activity

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.



**OptimaHealth**  
A Service of Sentara

### Commission Information

#### Commissions Policy Statement

Optima Health 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.

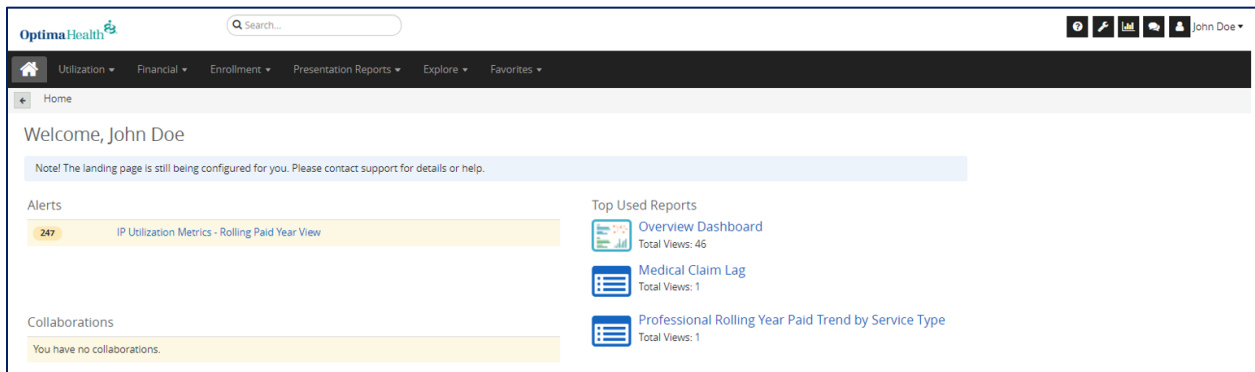
#### Guidelines

- 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.

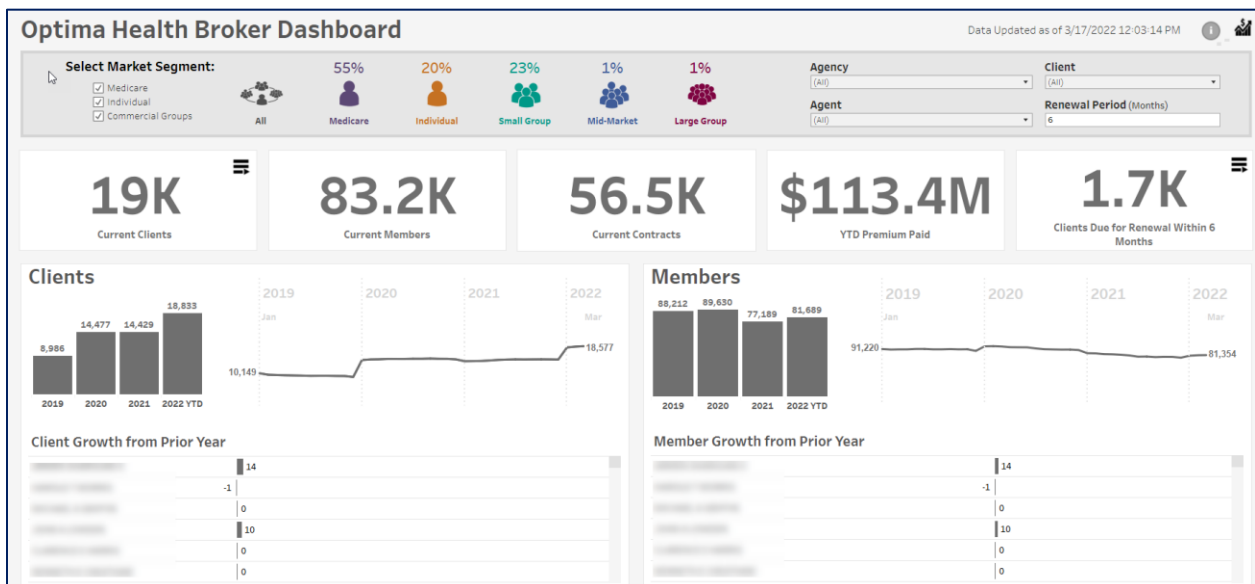
Within this tool, you are equipped with a learning library that offers multi-level training resources on the reporting tool also available at [optimahealth.com/needtoknow](https://optimahealth.com/needtoknow)



## Broker Book of Business

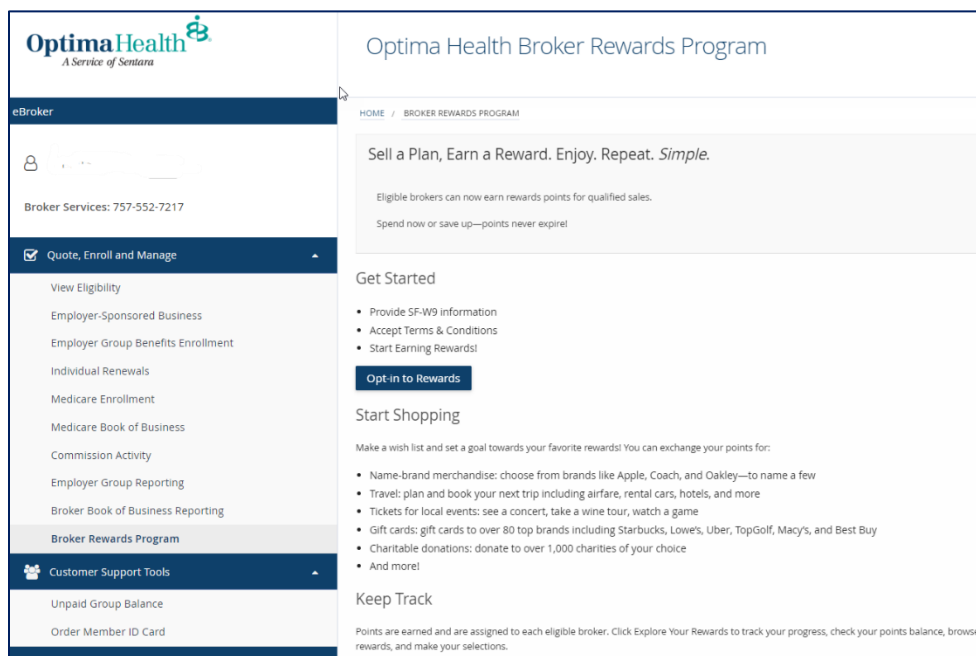
This interactive tool allows you to view your entire book of business or can be filtered by Market Segment or Product.

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 Optima Health 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 Optima Health Broker Rewards Program webpage. The page features a dark blue sidebar on the left with the Optima Health logo and navigation menu. The main content area is white and includes a header, a navigation breadcrumb, a main heading, a sub-heading, a list of steps to get started, a list of rewards, and a section for tracking points.

**Optima Health Broker Rewards Program**

HOME / BROKER REWARDS PROGRAM

Sell a Plan, Earn a Reward. Enjoy. Repeat. *Simple.*

Eligible brokers can now earn rewards points for qualified sales.  
Spend now or save up—points never expire!

**Get Started**

- Provide SF-W9 information
- Accept Terms & Conditions
- Start Earning Rewards!

**Opt-in to Rewards**

**Start Shopping**

Make a wish list and set a goal towards your favorite rewards! You can exchange your points for:

- 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 more!

**Keep Track**

Points are earned and are assigned to each eligible broker. Click Explore Your Rewards to track your progress, check your points balance, browse rewards, and make your selections.