

Broker Portal Overview 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.

eBroker Broker Home			Contact Us	8				
	Member Eligibility							
eBroker	HOME / MEMBER ELIGIBILITY							
8	Search by Member							
Broker Services: 757-552-7217		is a unique identifier (such as Member ID or Me						
✓ Quote, Enroll and Manage ✓ View Eligibility	much of the first and last name as po narrower your results. It is not necessary to complete the e	ssible. The more information entered in the "Me entire form.	ember Last Name	" field, the				
Employer New Business								
Employer Renewals	Group Number:			•				
Employer Benefits Enrollment	Group Number:	Group Name						
Individual New & Renewing	Policy ID:	Type the policy ID here						
Medicare Enrollment	Member ID:	Type the member ID here	*	01				
Medicare Book of Business	Subscriber Social Security Number:	-	-					
Commission Activity	Member Last Name:							
Commission Information	Member First Name:							
Employer Group Reporting								
Broker Book of Business Reporting	Search Clear							
Broker Rewards Program	Only the first 100 matches will be displa	yed.						
😁 Customer Support Tools 🔹								
Unpaid Group Balance								
Order Member ID Card								
Account Settings								
Change Password								
Secret Question and Answer								
Device Management Portal								



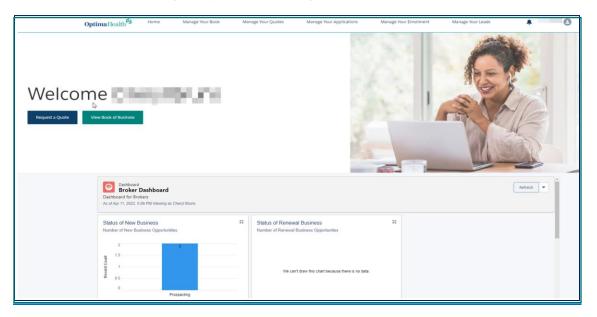
Your Homepage

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

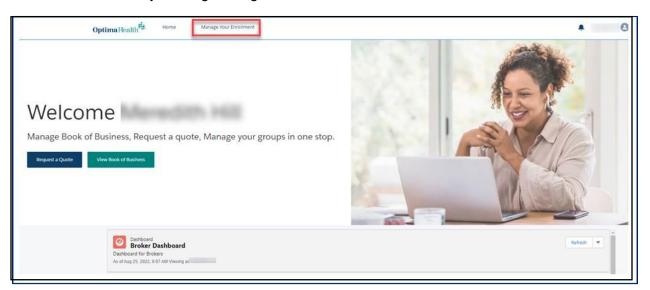
If you sell Employer Business, here you can manage your renewals and complete new business quotes created prior to April 10, 2023.

	ACTION CENTER		☆ 🚦
Brokers 🗸		+	* & C3 * *
NEWS (0) 🗘 🖨	MY INCOMPLETE ACTIVITIES (0)	UNDERWIRTTEN - NEW BUSINESS (0) Update 20204-17 196-36	
Title News Page Short Description Publish Date Themate an exercise available to display:	Appt Date Assigned To Agent Activity Type Description Group Contact Completed Towns are no research available to disclore	Proposed Effective Date Group Status eBroker Status Agency Agent Them are no executive multiplies to display:	
UNDERWRITTEN - RENEWALS (0)	QUOTES IN UNDERWRITING - NEW BUSINESS (0) 🗘 🖑		
☐ 콘텐 Proposed Effective Date One Orongo Status editorier Status Agency Agent There are no records analitable to display.	Effective Date Group Name Agent Agency These are no records analogies to display.		
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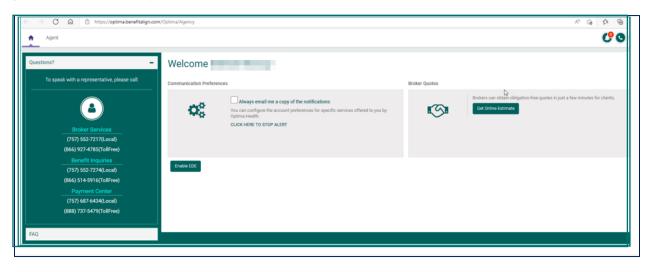
Employer Benefits Enrollment (e3 Web Enrollment)

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-aglance. 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.

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to the resource pa	ge to submit	your client`s H	IRA today	and collect	\$50! See p	rogram i	rules for details.											>
Dashboard	ł														Optiı	naH	ealt	h
Dashboard Agent	s Agent Pro	file CRM 🕶	Resource	es Reports	-										Messages			
CRM OVERVIEW Start Date: 01/12/2022			ind Date: 04/12/20	022			Refresh Das	aboard		ampaign Status		ß						
		Leads Sta	itus			-			C.	ampaign Status								
Group	Agents	Prospects	Leads	Closed- Lost	Closed- Won	I.	Campaig	n Cost	Lead	Cost per lead	Sales	Cost per Sale						
Direct Contract	26	3	0	0	0													
Optima Contact Center	41	63	55	4	235													



Medicare Book of Business

Here you can view your sold Medicare policies.

er: Period Year: arigian Armen 7 2022 ok of Business Commission Compliance General			,
Optima Health Policy Sales Over Time Policies by Product Family 30	Optima Health Expiring Policies O Within 90 days	Virginia Premier Expiring Policies O Within 90 days	Virginia Premier Policy Sales Over Time Policies by Product Family 30
25	Optima Health Active Customers 39 As of today	Virginia Premier Active Customers O As of today	25
10 5 2018 2019 2020 2021 2022	Optima Health Year to Date Policy S Court of policy sold 21 Year to date	sales	

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.

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	04/04/22 VENDOR: CHECK#: 2728227	OPTIMA HEALTH RE	MIT FOR		CONTROL#:	PAGE: 1 12#5604993	
	AGENT NAME PAY DT GROUP# GROUP	NAME MRKSEG	RATE	PREM/CONTRACT	RETRO#	NET\$	
	03-01-22 15062 03-01-22 18473 03-01-22 5993	4-14 15-24 15-24	\$15.15 \$12.63 \$12.63	4 22 21	0 1 0	\$60.60 \$290.49 \$265.23	



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.

WEEKLY COMMIS	SSIONS	AG (All	ENCY	AGENT	CLIENT (All)			Ê	Last Updated: 4/6/2022 9:07:32 AM		
YEARLY COMMISSION			QUARTERLY (COMMISSION TRE	ND						
\$20.91M	\$20.55M		2020			2021			2022		
			Q1							Q2	2
		\$10.20M									
			\$5.73M								
			\$5.73M					-•			
2020	2021	2022								B B	86.94
AGENTS					CLIENTS						
100				\$2.83M						\$46.42K	
10000-00000		\$510.98K							\$27.95K		
and the second second		\$116.70K					-		\$23.55K		
And a reacted at	1	113.15K					-		\$23.30K		
10.000 C 00.000	5	103.96K					_		\$21.83K		
TANKS I CARPORE	5	102.60K					_		\$19.30K \$17.44K		
and the second second	\$	100.99K				_	-		\$17.44K		
And a second second second	\$	98.83K				And the second second	-		\$17.38K		
	\$	95.40K							\$16.93K		
100.000 Ptd		87.63K					-		\$15.19K		
10.00	s	83.56K							\$14.86K		
and the second	\$	81.95K							\$14.78K		

Commission Information

Here you can view the current commission policy statement and guidelines.

Optima Health 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; 80/40, 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

Optima Health	Q Search			0 F 🔟 오
Utilization -	Financial • Enrollment • Presentation	Reports • Explore • Favorites •		
← Home				
Welcome, Jo	bhn Doe			
Note! The landing	page is still being configured for you. Please conta	ct support for details or help.		
Alerts			Top Used Reports	
247	P Utilization Metrics - Rolling Paid Year View		Overview Dashboard Total Views: 46	
			Medical Claim Lag Total Views: 1	
Collaborations			Professional Rolling Year Paid Trend by Service Type	
You have no collab	orations.		Total Views: 1	

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.

Optima Health Bro	oker Da	shboard	t						Data Updated	as of 3/17/2022 12:03:1	4 PM 🕕 🛔
Select Market Segment: ✓ Medicare ✓ individual ✓ Commercial Groups	All	55%	20%	23%	1% Å	1% Earge Group	Agency (AII) Agent (AII)		•	Client (All) Renewal Period (Month 6	• hs)
19K Current Clients	₽	83.			56.			L3.4	M	1.7 Clients Due for Renew Months	
Clients	2019 Jan 10,149	2020) 202	1	2022 Mar 18,577		2021 2022 YTD	2019 Jan 11,220	2020	2021	2022 Mar 81,354
Client Growth from Prior Year						Member Growt	th from Prior Ye	ar			
	14								-1		
	0								0		
	10								10		
	0								0		
	0								0		



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!

Optima Health	Optima Health Broker Rewards Program
eBroker	HOME / BROKER REWARDS PROGRAM
8	Sell a Plan, Earn a Reward. Enjoy. Repeat. Simple.
Broker Services: 757-552-7217	Eligible brokers can now earn rewards points for qualified sales. Spend now or save up—points never expire!
Vuote, Enroll and Manage	
View Eligibility	Get Started
Employer-Sponsored Business	Provide SF-W9 information
Employer Group Benefits Enrollment	Accept Terms & Conditions Start Earning Rewards1
Individual Renewals	Opt-in to Rewards
Medicare Enrollment	
Medicare Book of Business	Start Shopping
Commission Activity	Make a wish list and set a goal towards your favorite rewards! You can exchange your points for:
Employer Group Reporting	Name-brand merchandise: choose from brands like Apple, Coach, and Oakley—to name a few
Broker Book of Business Reporting	 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
Broker Rewards Program	Gift cards: gift cards to over 80 top brands including Starbucks, Lowe's, Uber, TopGolf, Macy's, and Best Buy
Customer Support Tools	Charitable donations: donate to over 1,000 charities of your choice And morel
Unpaid Group Balance	Keep Track
Order Member ID Card	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.