

## **Broker User Guide - Employer Application Process**

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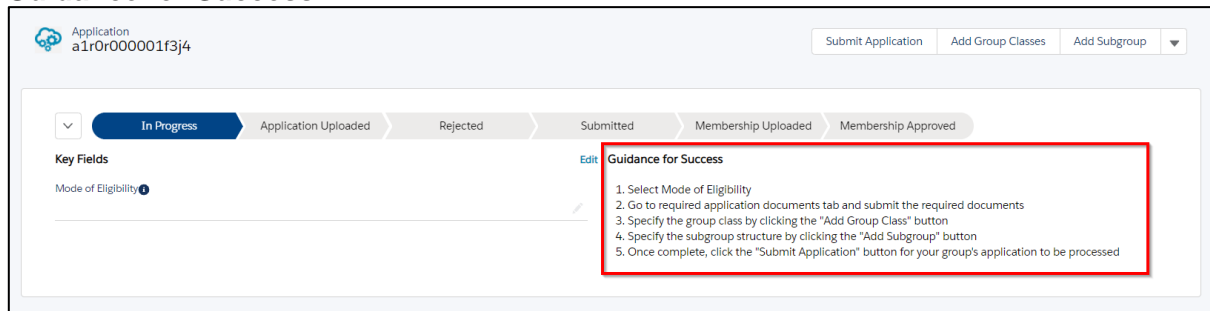
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## Purpose

The purpose of this user guide is to provide an overview of the employer application process for Brokers.

## Application Process

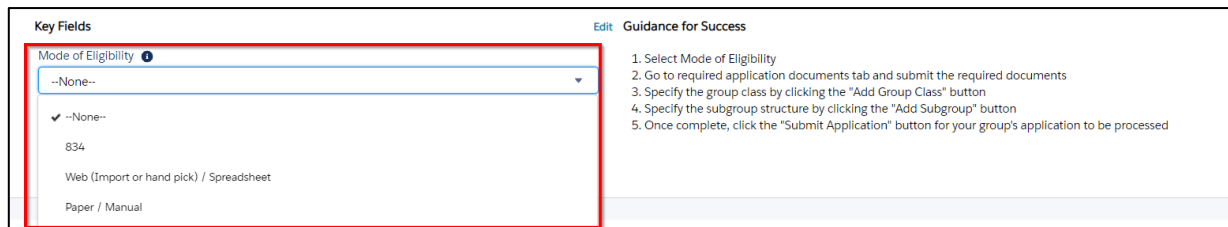
Once you accepted your quote, the employer application screen will display, and you will see the **Guidance for Success**.



The screenshot shows the application interface for ID 'a1r0r000001f3j4'. At the top right are buttons for 'Submit Application', 'Add Group Classes', and 'Add Subgroup'. A progress bar below shows stages: 'In Progress' (active), 'Application Uploaded', 'Rejected', 'Submitted', 'Membership Uploaded', and 'Membership Approved'. Under 'Key Fields', the 'Mode of Eligibility' field is highlighted with a red box. To its right, a 'Guidance for Success' box (also red-bordered) contains the following instructions:

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

## Select Mode of Eligibility.



This screenshot shows the 'Mode of Eligibility' dropdown menu expanded. The dropdown is highlighted with a red box. The options listed are: '--None--', '834', 'Web (Import or hand pick) / Spreadsheet', and 'Paper / Manual'. To the right, the 'Guidance for Success' box is visible, containing the same five-step instruction list as in the previous screenshot.

Go to **Required Application Documents** tab and submit the required documents.

Required Application Documents

Application Name a1r0r000001f3j4	Status In Progress
Account <a href="#">Test 15</a>	Broker Account <a href="#">Test 15</a>
Opportunity <a href="#">Test 15 9/1/2021 Barbara Penn</a>	Owner <a href="#">Tracye Watts</a>
Quote <a href="#">Test 15 9/1/2021 Barbara Penn</a>	Sales Rep <a href="#">Tracye Watts</a>
Census	Primary Applicant Contact <a href="#">Barbara Penn</a>
Contract	Mode of Eligibility 834

Details **Required Application Documents**

APPLICATION DOCUMENTS 5

<b>VEC Report</b> Due:  <span style="color: red;">No Files Yet</span>	<b>Employer Group Application</b> Due:  <span style="color: red;">No Files Yet</span>	<b>Binder Check</b> Due:  <span style="color: red;">No Files Yet</span>	<b>Member Application</b> Due:  <span style="color: red;">No Files Yet</span>
<b>Waivers</b> Due:  <span style="color: red;">No Files Yet</span>	<b>Extra Files in Application Documents</b>  Due:  <span style="color: red;">No Files Yet</span>		

Once the steps are completed, click **Submit Application**

Application  
a1r0r000001f3j4

Submit Application
Add Group Classes
Add Subgroup

▼
In Progress
Application Uploaded
Rejected
Submitted
Membership Uploaded
Membership Approved

Edit **Guidance for Success**

**Key Fields**

Mode of Eligibility   
834

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

A message will display indicating your application was submitted and will workflow to the Optima Sales Team.

Submit Application

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Click Submit Application to submit your Group Application.

Upon submission, your required application documents will be reviewed. An Optima Health representative will be in touch shortly.

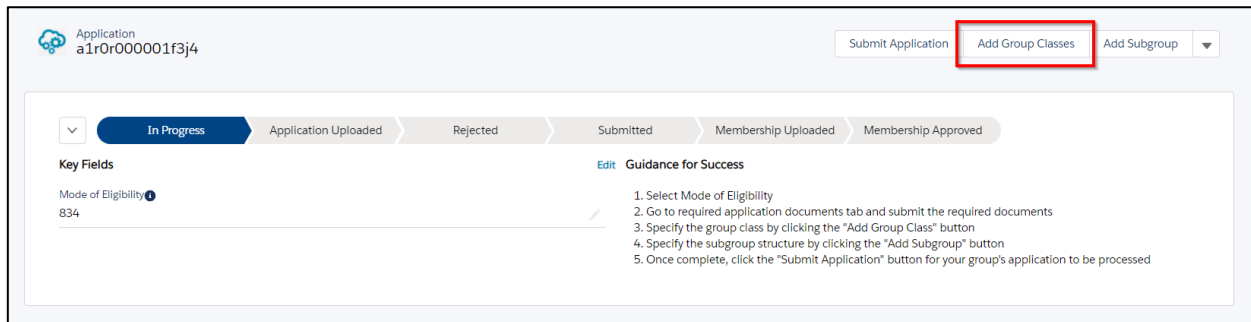
Thank you for choosing Optima Health!

Next

## Add Group Class

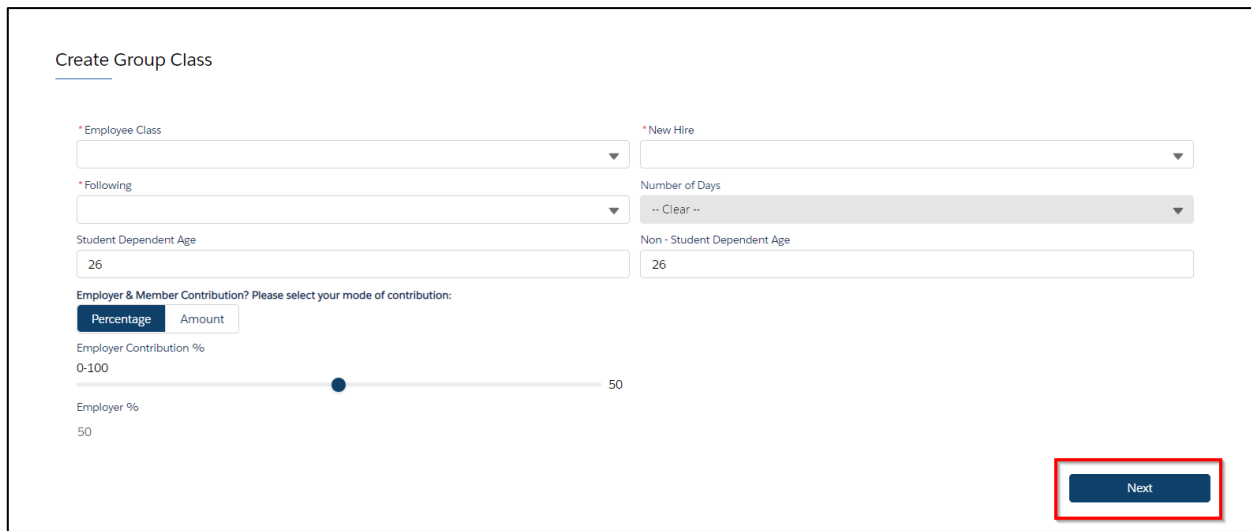
Adding a group class is not required but the steps on how to do this task are below.

Specify the group class by clicking **Add Group Class**




The screenshot shows the application dashboard for application ID 'a1r0r000001f3j4'. At the top right, there are three buttons: 'Submit Application', 'Add Group Classes' (highlighted with a red box), and 'Add Subgroup'. Below the buttons is a progress bar with stages: 'In Progress' (active), 'Application Uploaded', 'Rejected', 'Submitted', 'Membership Uploaded', and 'Membership Approved'. Under 'Key Fields', the 'Mode of Eligibility' is set to '834'. To the right, there is a 'Guidance for Success' section with five numbered steps: 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.

Fill out the Group Class Information and click **Next**



The 'Create Group Class' form contains several fields: 'Employee Class' (dropdown), 'New Hire' (dropdown), 'Following' (dropdown), 'Number of Days' (dropdown with '-- Clear --' option), 'Student Dependent Age' (text input with value '26'), and 'Non - Student Dependent Age' (text input with value '26'). Below these is a section for 'Employer & Member Contribution?' with two tabs: 'Percentage' (selected) and 'Amount'. A slider shows 'Employer Contribution %' from 0 to 100, with the current value set to 50. A 'Next' button is located at the bottom right and is highlighted with a red box.

You will receive a message indicating your group class has been created. Click **Finish**.



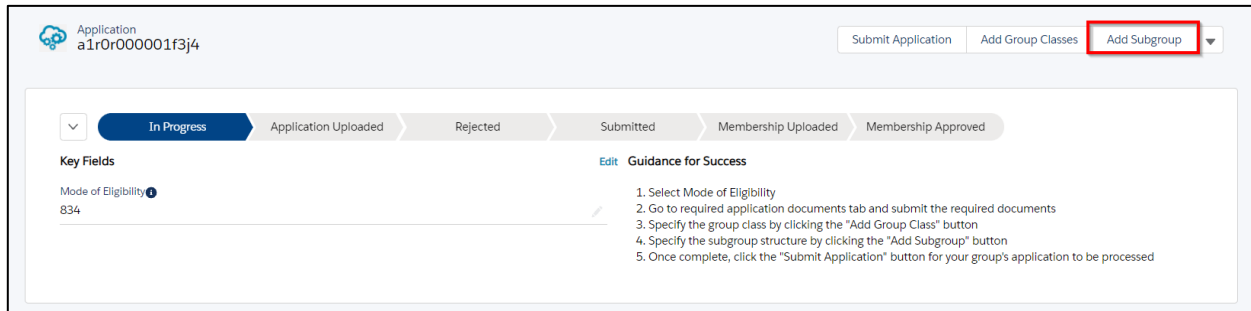
The confirmation message reads 'Group Class Created' and 'Group class has been created for Group Test 15'. A 'Finish' button is located at the bottom right and is highlighted with a red box.

## Add Subgroup

Adding a subgroup is optional. The steps on how to add a subgroup are below.

You can **Add Subgroup** by following the steps below.

Click **Add Subgroup**.



Application a1r0r000001f3j4

Submit Application Add Group Classes **Add Subgroup**

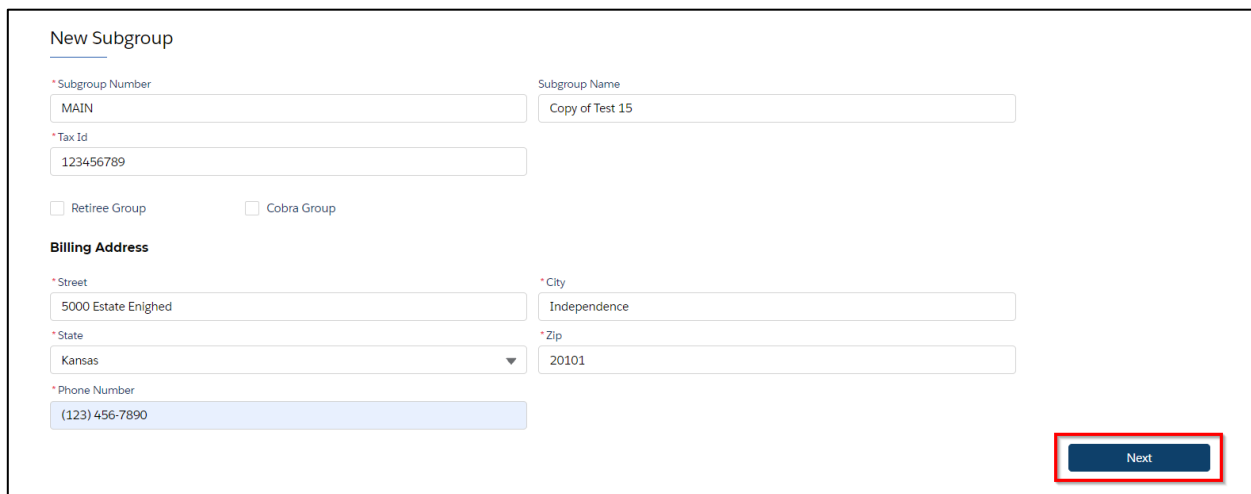
**In Progress** Application Uploaded Rejected Submitted Membership Uploaded Membership Approved

**Key Fields** [Edit](#) **Guidance for Success**

Mode of Eligibility 834

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

Fill out the subgroup information and click **Next**.



**New Subgroup**

\*Subgroup Number MAIN Subgroup Name Copy of Test 15

\*Tax Id 123456789

Retiree Group  Cobra Group

**Billing Address**

\*Street 5000 Estate Enghed \*City Independence

\*State Kansas \*Zip 20101

\*Phone Number (123) 456-7890

**Next**

You will receive a message indicating your subgroup has been created. Click **Finish**.



**Subgroup Created**

New Subgroup **MAIN** is successfully created for Group

**Finish**