Broker User Guide - Employer Application Process

OptimaHealth

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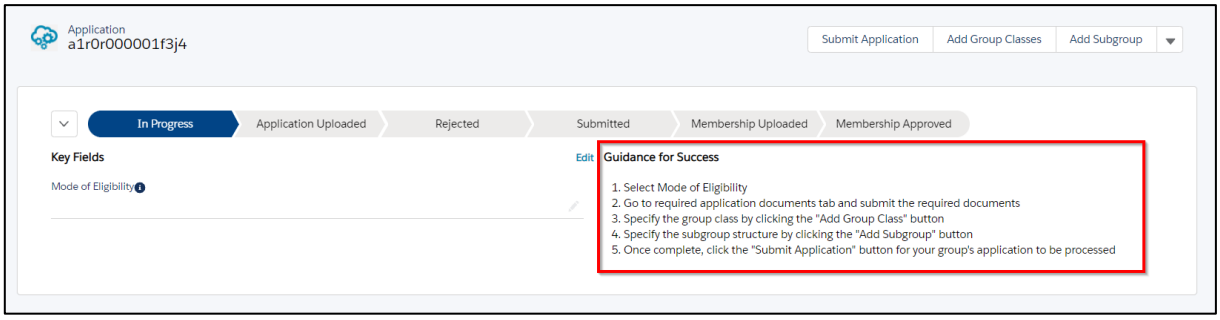
Purpose

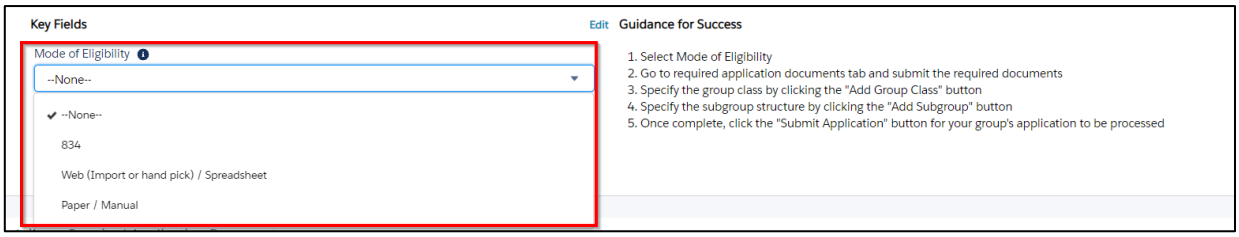
The purpose of this user guide is to provide an overview of the employer application process for Brokers.

Application Process

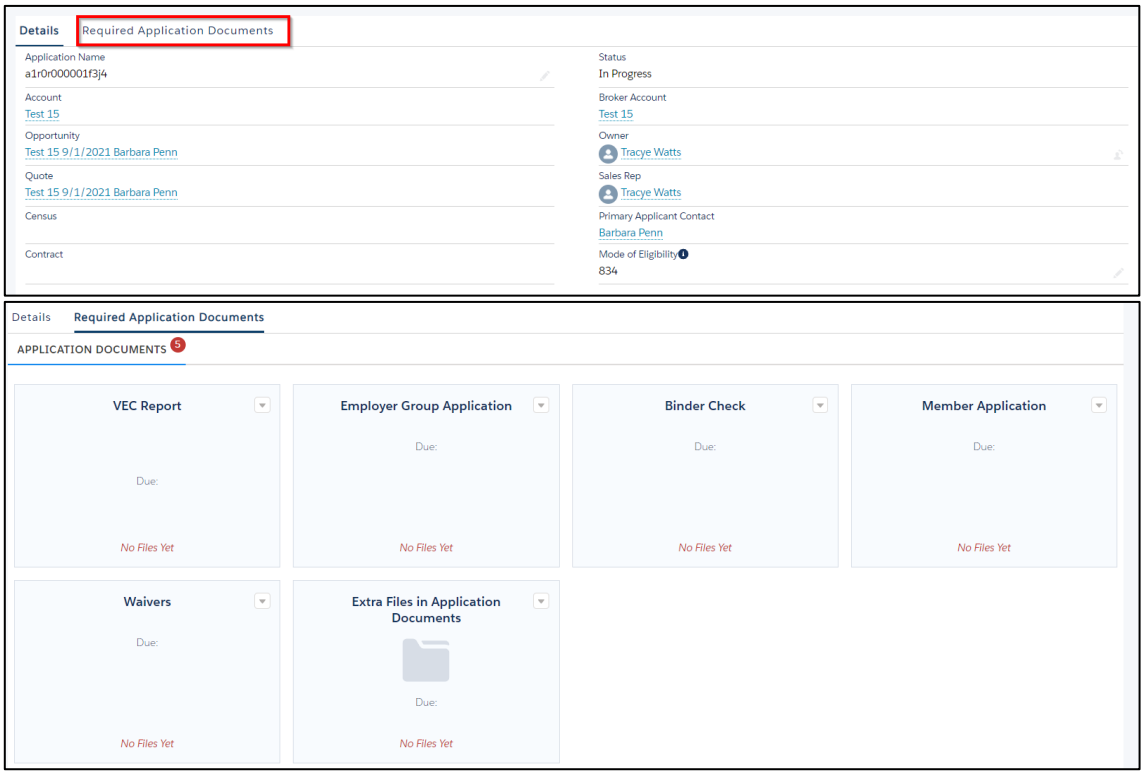
Once you accepted your quote, the employer application screen will display, and you will see the **Guidance for Success**.



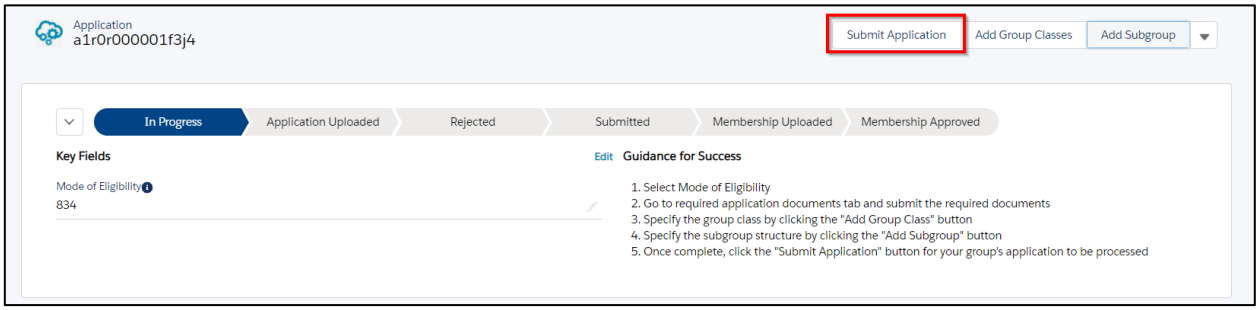
Select **Mode of Eligibility**.



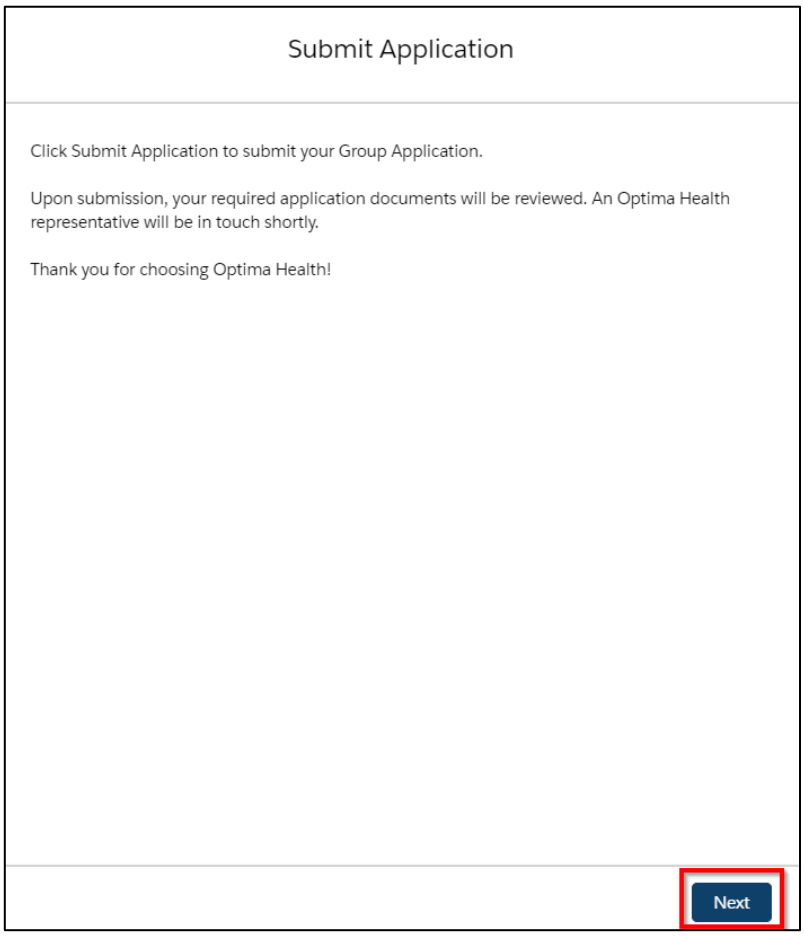
Go to **Required Application Documents** tab and submit the required documents.



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



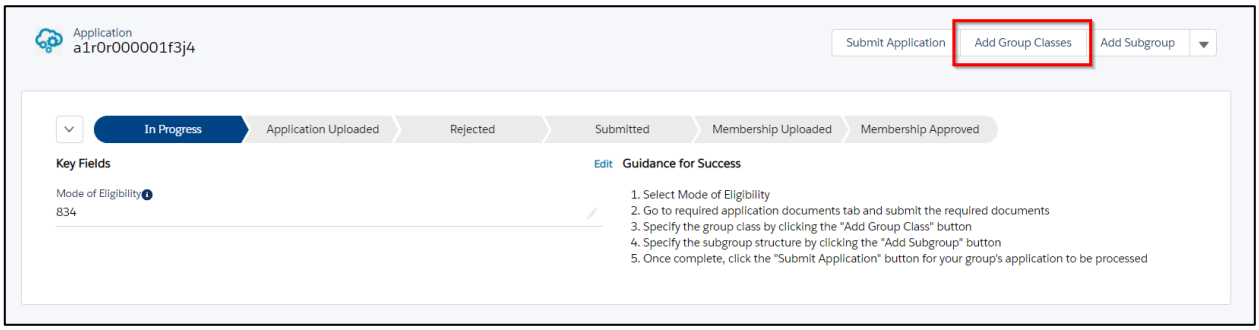
A message will display indicating your application was submitted and will workflow to the Optima Sales Team.



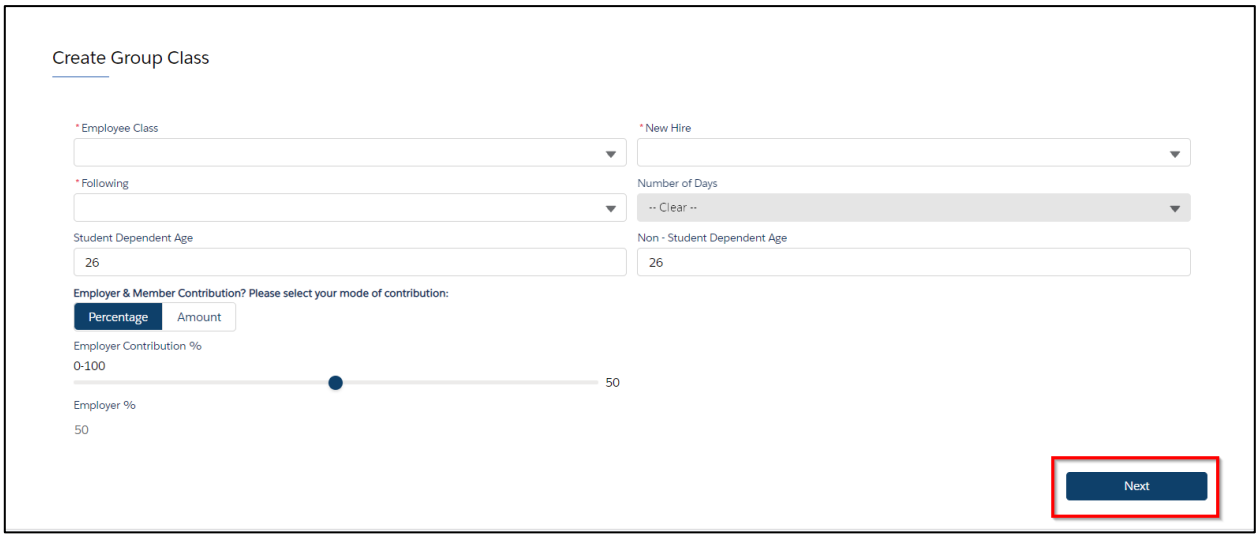
Add Group Class

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

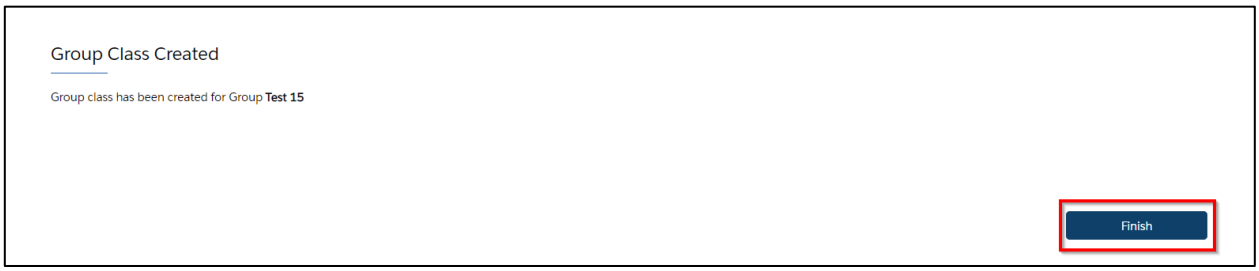
Specify the group class by clicking **Add Group Class**



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



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

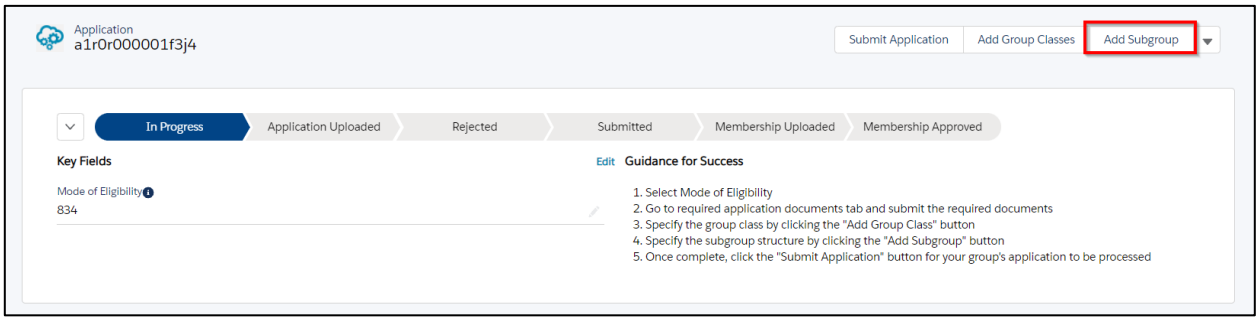


Add Subgroup

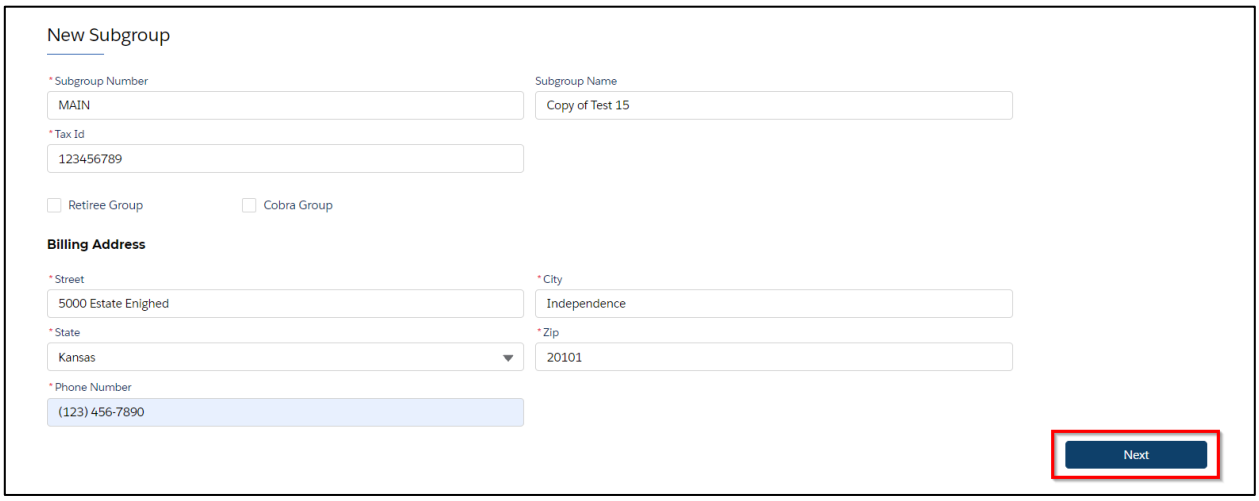
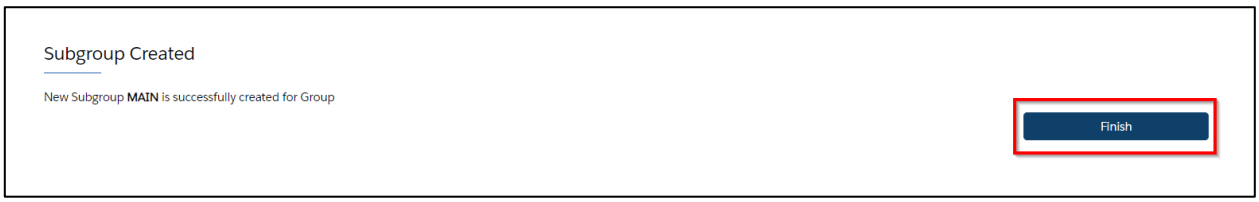
Adding a subgroup is optional. The steps on how to add a subgroup are below.

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

Click **Add Subgroup**.



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



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