



Broker Welcome Kit

OptimaHealth 

Dear Optima Health Broker,

Welcome to Optima Health!

This Welcome Kit will provide an overview of the functionality available to you on your secure Broker portal, information on Broker Rewards, and a list of helpful resources and links. These materials will ensure your success as a broker with Optima Health, so be sure to keep this kit handy.

We are proud to offer innovative tools to help you work smarter, not harder. We also offer ongoing training opportunities with instructor-led Q&A sessions, step-by-step user guides, and videos to equip you to be efficient. And of course, opportunities to earn cash, prizes, and so much more on top of a competitive commission plan—just for selling Optima Health plans!

If you have any questions, please contact Broker Services at **1-866-927-4785** or brokerservices@optimahealth.com

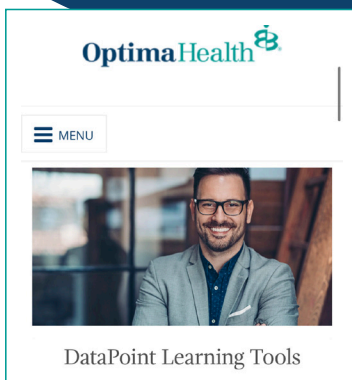
We look forward to a long lasting and prosperous partnership.

Sincerely,

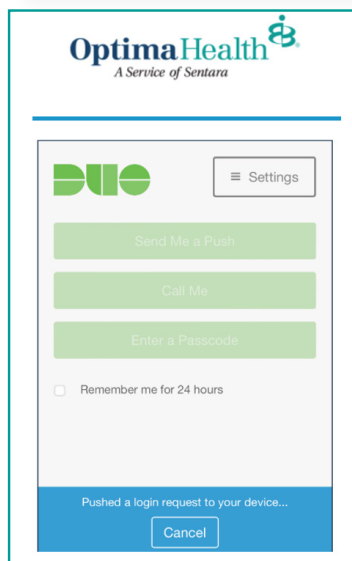
Annie Alexander

Director of Sales Operations

How to access the Broker Portal



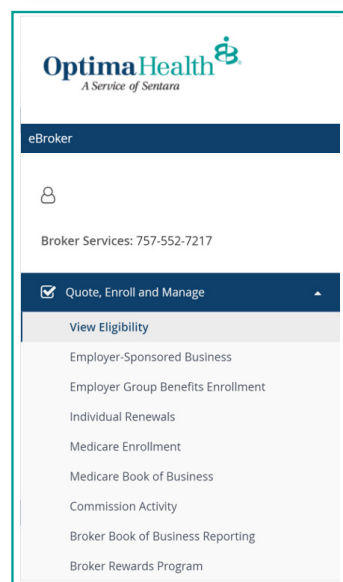
1 Sign into optimahealth.com/brokers



2 The Duo authentication pop up window will appear.

Select your authentication method.

You are now signed into the Broker portal.



3 Select your action item from the main menu.

Do you need more help? We're here to support you. The Broker Portal Overview, Broker Guides, and other helpful information can be found on our [Broker Support](#) page.

Broker Rewards Program



Sell a plan, earn a reward.

Enjoy. Repeat. **Simple.**

Find out how you can become an eligible broker and start earning points!

Spend now or save up – points never expire!

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 premium 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, or watch a game



Gift cards: receive 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 assigned to each eligible broker. Sign in to [eBroker](#) to track your progress, check your points balance, browse rewards, and make your selections.

Opt-in today!



Stay up to date with the [most current program information.](#)

Helpful Resources



User Guides – Increase your efficiency of the quoting and enrollment process with:

- Broker Portal Overview
- Quoting user guides



Reporting & Dashboards for Broker Book of Business and Commissions -

This interactive tool gives you the ability to view your entire book of business and filter by Market Segment or Product. In addition, you can see your current and historical commission activity.



DataPoint - Are you a Large Group Broker? If so, be sure to take advantage of DataPoint, the employer reporting tool for customizable reporting and dashboards. Visit optimahealth.com/needtoknow to view:

- **Did You Know** - tips for functions and features of the reporting system
- **Learning Roadmap** - provides multi-level training opportunities