

**eBroker User Guide- Quick Start on
How to Request a Quote**

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Purpose

The purpose of this user guide is to give you an overview of how to request a quote in the eBroker tool.

Request A Quote

Sign into the broker portal.



OptimaHealth 
A Service of Sentara

Broker Sign In

Username

Password

Sign In

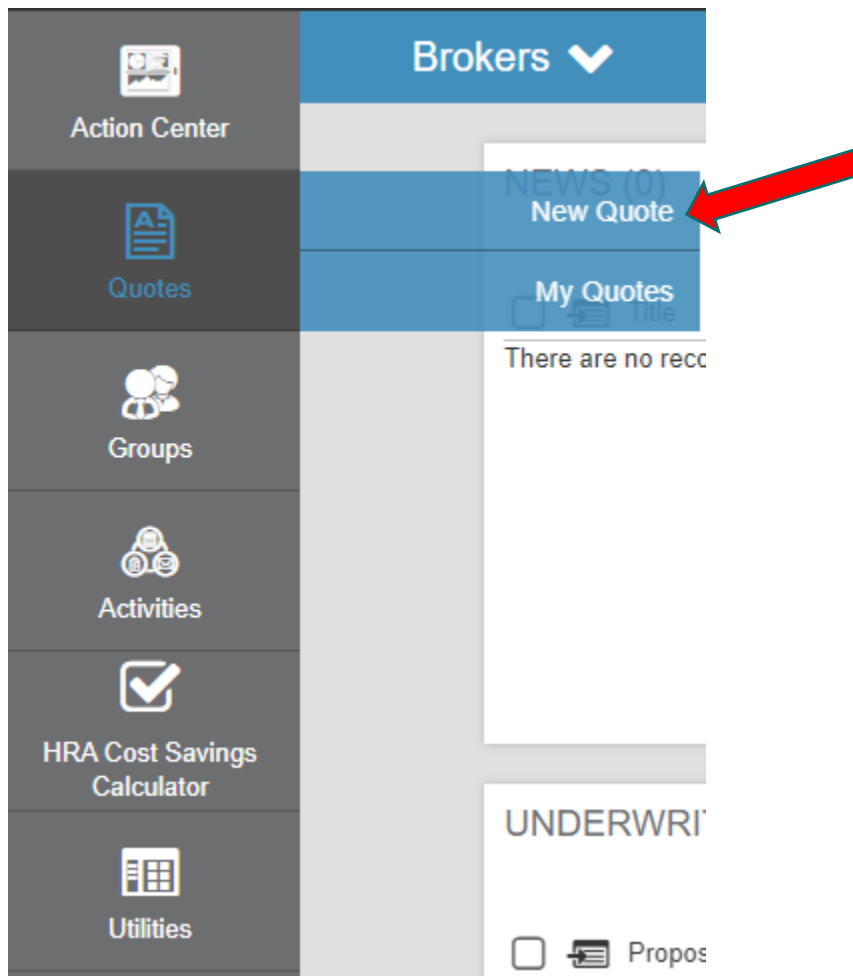
[Forgot Password?](#)

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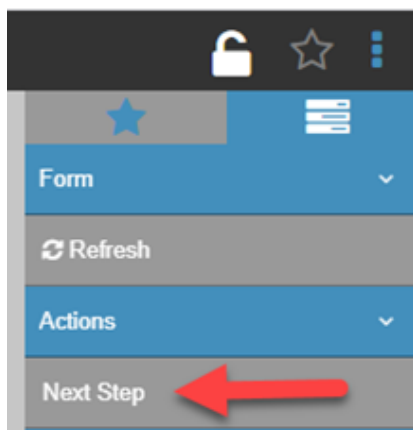
Click on the eBroker link. It would be labeled **Employer-Sponsored Business**



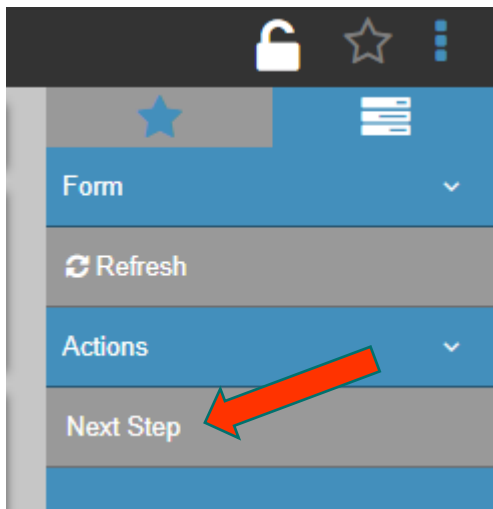
To create a new quote, in the left navigation bar, click on **Quotes** then **New Quote**.



Click on **Next Step** after all the required information on the new quote screen is filled out.



Click on **Next Step** to bypass the optional fields and go to the census page.

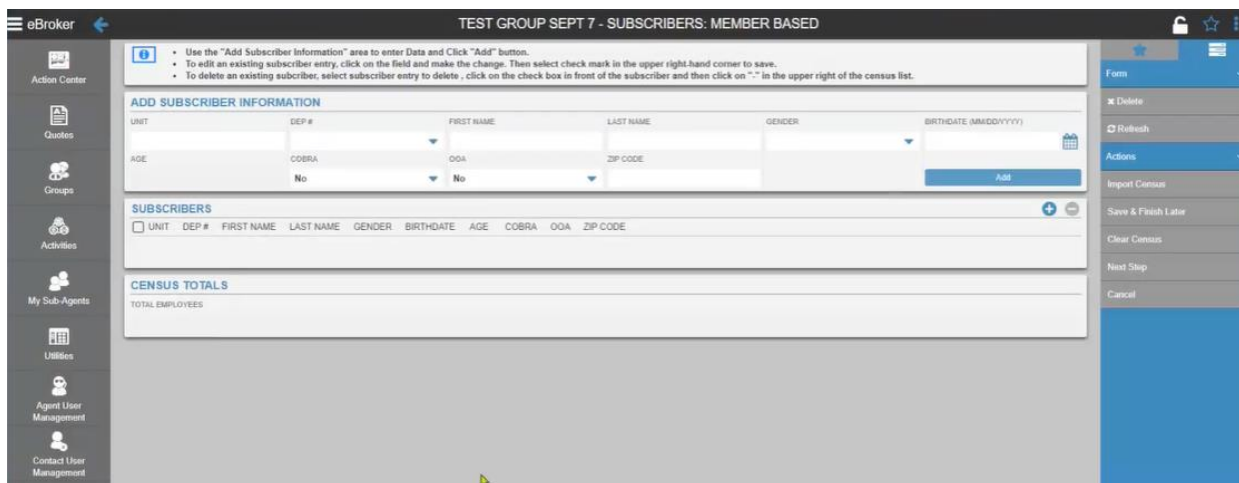


On the census page, you have the ability to add subscribers, one at a time on the screen, or the ability to import a census.

For small group census (2-50 members) functionality requires that every person receiving coverage (Subscriber, Spouse, and Dependents) must be included in the census. For each member, the following data is required, unless noted as optional (shown below in the order presented in the sample screen shot for a manually entered census):

- **Unit#** -- This is used to identify members who are related and covered as a unit (i.e., the employee and any related spouse/dependents). Each subscriber/employee and any related dependents must be assigned one Unit#, even if the employee is covering only himself. The first employee and all of his spouse/dependents would have a Unit# of 1, the second employee and all of her spouse/dependents have a Unit# of 2, etc.)
- **Dep#** -- This is used to identify all members within a Unit. The employee always has a Dep# of 01 and is required; 02 = Spouse; 03...06 etc. = Dependents. If there is no Spouse, skip "02". The first child Dependent is always 03. *Please see the screen shot below for an illustration of how the Unit# and Dep#s are assigned to a family.*
- **First Name**
- **Last Name**
- **Gender** – Enter Male or Female
- **Birthdate** – Enter as xx/yy/zzzz

- **Age (Optional)**
- **COBRA** – Enter Yes or No
- Out of Area (“**OOA**”) – Enter Yes or No
- **Zip Code** (“Zip”; this field is Optional)
- All fields are required, except Age & ZIP code.



The format to import information is shown below:

First_Name	Last_Name	Gender	Birthdate	Age	COBRA	Out_of_Area
------------	-----------	--------	-----------	-----	-------	-------------

OHP_Unit_Number	OHP_Dep_Number	Zip
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The headers must be spelled the same way and in the same order as above. Underscores shown above are required.

- Data in all fields is required, except Age and Zip which are optional.
- Excel files must be saved in a comma-delimited CSV file format in order to upload.

eBroker 123 TEST 123A - SUBSCRIBERS: MEMBER BASED

- Use the "Add Subscriber Information" area to enter Data and Click "Add" button.
- To edit an existing subscriber entry, click on the field and make the change. Then select check mark in the upper right hand corner to save.
- To delete an existing subscriber, select subscriber entry to delete, click on the check box in front of the subscriber and then click on "-" in the upper right of the census list.

ADD SUBSCRIBER INFORMATION

UNIT	DEP #	FIRST NAME	LAST NAME	GENDER	BIRTHDATE (MM/DD/YYYY)
AGE	COBRA	OOA	ZIP CODE		
	No	No			

SUBSCRIBERS

<input type="checkbox"/>	UNIT	DEP #	FIRST NAME	LAST NAME	GENDER	BIRTHDATE	AGE	COBRA	OOA	ZIP CODE
<input type="checkbox"/>	1	01	Ken	Smith	Male	05/05/1979	43	No	No	
<input type="checkbox"/>	1	02	Karen	Smith	Female	11/25/1977	44	No	No	
<input type="checkbox"/>	1	03	Kay	Smith	Female	09/05/2005	16	No	No	
<input type="checkbox"/>	2	01	Mary	Orange	Female	03/15/1977	45	No	No	
<input type="checkbox"/>	2	02	Joe	Orange	Male	07/07/1978	43	No	No	
<input type="checkbox"/>	3	01	Ken	Blue	Male	05/05/1979	43	No	No	
<input type="checkbox"/>	3	02	Karen	Blue	Female	11/25/1977	44	No	No	
<input type="checkbox"/>	4	01	Mary	White	Female	03/15/1977	45	No	No	
<input type="checkbox"/>	4	02	Joe	White	Male	07/07/1978	43	No	No	
<input type="checkbox"/>	4	03	Jane	White	Female	07/07/2008	13	No	No	
<input type="checkbox"/>	4	04	Kid1	White	Male	01/01/2010	12	No	No	
<input type="checkbox"/>	4	05	Kid2	White	Female	03/15/2018	4	No	No	
<input type="checkbox"/>	4	06	Kid3	White	Female	07/07/2015	6	No	No	
<input type="checkbox"/>	5	01	Anne	Paris	Female	06/06/1980	42	No	No	

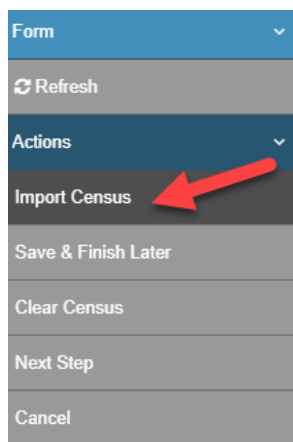
CENSUS TOTALS

TOTAL EMPLOYEES
5

For Mid-market groups

- To manually enter a census fill in the same information as above into the fields on the screen, then hit **add**. Repeat this step for each member.

To import a census. Click on **import census**



Form

Refresh

Actions

Import Census

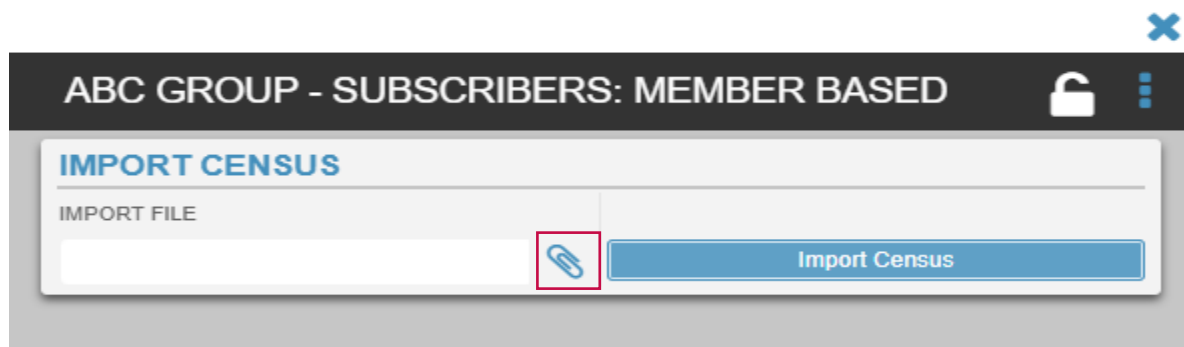
Save & Finish Later

Clear Census

Next Step

Cancel

Click on the paper clip icon



The format that should be used on all imported files is CSV (Comma Separated Values) type files. Here is the order to be used:

[First_Name, Last_Name, Gender (Male or Female), Birthdate (format: MM/DD/YYYY), Spouse (Yes or No), Children (# of), COBRA (Yes or No), OOA (Yes or No), ZIP (5 digits), Product_Line (optional)]

A file can be imported without a First Name or Last Name (but leave the “space” for those values in the spreadsheet) and Age (this will be auto calculated based on the DOB)

First_Name,Last_Name,Gender,Birthdate,Age,Spouse,Children,COBRA,Out_of_Area,Zip,Product_Line

,,Male,7/13/1971,,No,0,No,No,22923,2800
,,Female,12/23/1980,,No,0,No,No,22911,2800
,,Female,4/25/1966,,No,0,No,No,22901,E3000
,,Male,5/27/1977,,No,0,No,No,22901,2800
,,Female,2/25/1961,,No,1,No,No,22911,2800
,,Female,1/12/1991,,No,0,No,No,22942,E3000

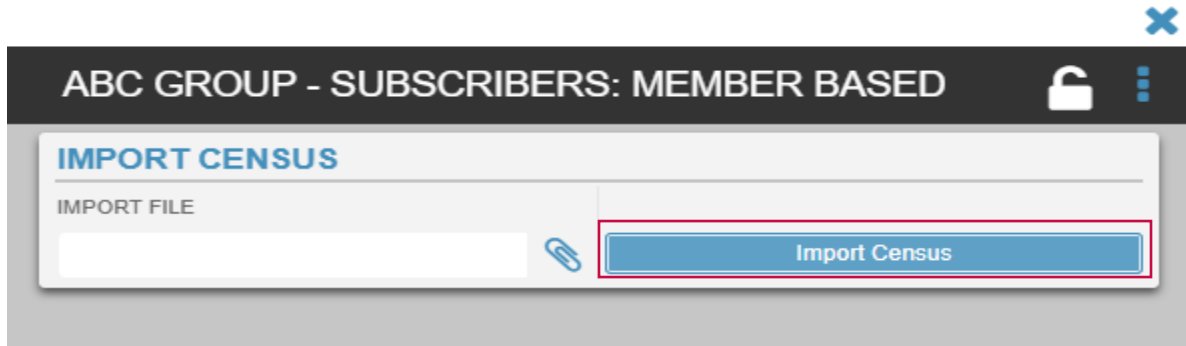
OR

A file can be imported with just the age missing (this will be auto calculated based on the DOB)

First_Name,Last_Name,Gender,Birthdate,Age,Spouse,Children,COBRA,Out_of_Area,Zip,Product_Line

Anna Marie,Amgi,Male,7/13/19XX,,No,0,No,No,22923,2800
Carol Ann,Bag,Female,12/23/19XX,,No,0,No,No,22911,2800
Brenda Mae,Blak,Female,4/25/19XX,,No,0,No,No,22901,E3000
Tammy C,Bro,Male,5/27/19XX,,No,0,No,No,22901,2800
Mary Ellen,Dan,Female,2/25/19XX,,No,1,No,No,22911,2800
Ashley Danielle,Eva,Female,1/12/19XX,,No,0,No,No,22942,E3000

add your census and then click **Import Census**



If all of your records were imported then they will show up in the census in eBroker

Use the "Add Subscriber Information" area to enter Data and Click "Add" button.
 To edit an existing subscriber entry, click on the field and make the change. Then select check mark in the upper right-hand corner to save.
 To delete an existing subscriber, select subscriber entry to delete, click on the check box in front of the subscriber and then click on "-" in the upper right of the census list.

ADD SUBSCRIBER INFORMATION

FIRST NAME: [] LAST NAME: [] GENDER: [] BIRTHDATE (MMDDYYYY): [] AGE: [] SPOUSE: [No]

CHILDREN: [] COBRA: [No] OOA: [No] ZIP CODE: [] PRODUCT LINE: [] **Add**

SUBSCRIBERS

<input type="checkbox"/>	FIRST NAME	LAST NAME	GENDER	BIRTHDATE ↑	AGE	SPOUSE	CHILDREN	COBRA	OOA	ZIP CODE	PRODUCT LINE
<input type="checkbox"/>	LARRY W	T	Male	05	71	No	0	No	No	23456	HMO
<input type="checkbox"/>	WILLIAM K	M	Male	03	70	No	0	No	No	23456	HMO
<input type="checkbox"/>	WILLIAM C	S	Male	12	69	No	0	No	No	23456	HMO
<input type="checkbox"/>	JAMES L	T	Male	11	69	No	0	No	No	23456	HMO
<input type="checkbox"/>	OTIS D	M	Male	05	67	Yes	0	No	No	23456	HMO
<input type="checkbox"/>	Rocket	M	Male	05	67	No	0	No	No	23456	PPO
<input type="checkbox"/>	WILLIAM M	H	Male	07	67	No	0	No	No	23456	HMO
<input type="checkbox"/>	NELSON L	F	Male	06	65	Yes	0	No	No	23456	HMO
<input type="checkbox"/>	DENNIS G	P	Male	05	65	No	3	No	No	23456	HMO
<input type="checkbox"/>	DALE W	B	Male	10	64	No	0	No	No	23456	HMO
<input type="checkbox"/>	KATHIE D	B	Female	06	63	Yes	0	No	No	23456	HMO
<input type="checkbox"/>	ERNESTO	L	Male	05	63	No	0	No	No	23456	HMO
<input type="checkbox"/>	EARNEST E	S	Male	02	62	No	0	No	No	23222	PPO
<input type="checkbox"/>	CRAIG S	A	Male	06	62	No	0	No	No	23456	HMO
<input type="checkbox"/>	KIM M	E	Female	05	62	No	0	No	No	23456	PPO
<input type="checkbox"/>	EDWIN S	M	Male	04	61	No	0	No	No	23222	PPO
<input type="checkbox"/>	DALE A	M	Male	04	61	Yes	0	No	No	23456	HMO

If some or all of your records fail to import you'll need to open the CSV file in notepad to look at where the commas are in the file

On the Plan Selection page is where Plans are selected for quoting. Select the plans to be added to the quote. Drill down the desired plan family and check the box on the right side of the screen.

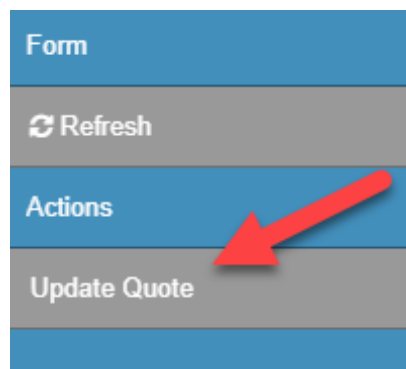
RIDER SELECTION			
Morbid Obesity (MOR)	<input type="checkbox"/>		
Autism Benefit (AUT)	<input checked="" type="checkbox"/>		(Already Selected)
Chiropractic Rider (CHIRO)	<input type="checkbox"/>		

PLAN SELECTION			
Family / Plan	Type	Plan Info	Select
▶ Optima Vantage	Medical		
▶ Optima Vantage Equity	Medical		
▶ Optima Vantage Design	Medical		
▶ Optima POS	Medical		
▶ Optima POS Equity	Medical		
▶ Optima POS Design	Medical		
▼ Optima Plus	Medical		
Optima Plus 20/20% (1/1/2022)	Medical		<input checked="" type="checkbox"/>
Optima Plus 25/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 30/30% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 500/25/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 1000/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 1000/25/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 1000/30/30% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 1500/25/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 2000/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 2000/20/30% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 3000/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 3000/30/30% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 4000/30/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 5000/30/30% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus 6000/20% (1/1/2022)	Medical		<input type="checkbox"/>
Optima Plus Equity	Medical		
Optima Plus Design	Medical		

For mid-market groups select the pharmacy options for each plan, small group quoting skips this step.

RX BENEFIT SELECTION	
Plan / Benefit	Select
▼ Optima Plus 20/20% (1/1/2022) <ul style="list-style-type: none"> <input type="checkbox"/> CLS 10 BD; 45/75/20% AD; 150 RX DED <input type="checkbox"/> OPN 10 BD; 45/75/20% AD; 150 RX DED <input type="checkbox"/> OPN 15/40/75/20% <input type="checkbox"/> CLS 15/40/75/20% 	<input checked="" type="checkbox"/> Default Benefit <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

After all the desired plans are selected, click **Update Quote** on the right menu.

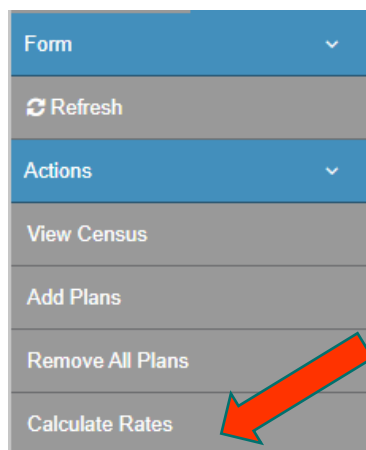


After selecting the plans you will be redirected back to the main group page. Calculate Rates is on the main group screen.

At the bottom of the page, you will see the selected plans.

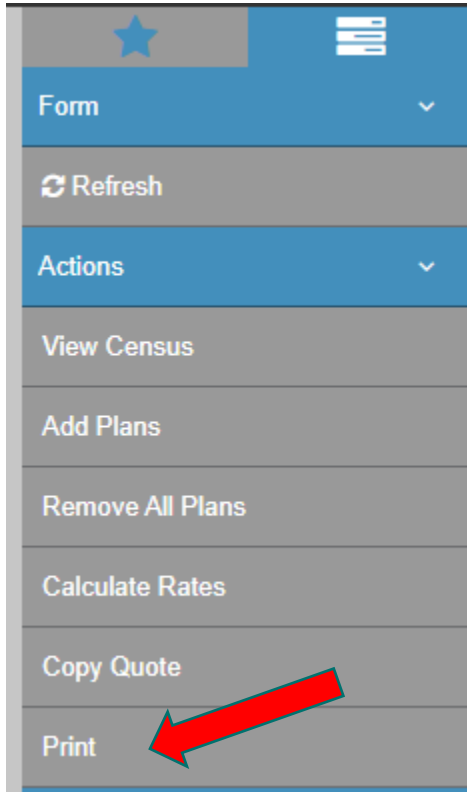
- CON (contract) checkbox is checked if the quote is for that contract year. If the quote is for calendar year, then the box will not be checked.
- When PROP (proposal) is checked then the plan will show up on the printed proposal. Uncheck the PROP box to remove a plan from the proposal.
- When COMP (comparison) is checked then those plans will be available to compare in the printed proposal.

Click on the **Calculate Rates** on the right-side menu to calculate the rates. This will generate the rates. Rates should be calculated before printing the proposal.



NOTE: for small group this can be done immediately, for mid-market the quote must be underwritten 1st before this is available.

Click Print to go to the print options screen.



Print Menu has many options to consider before printing. Select desired options and click **print**.

