

**Broker User Guide - Group Application  
Process**

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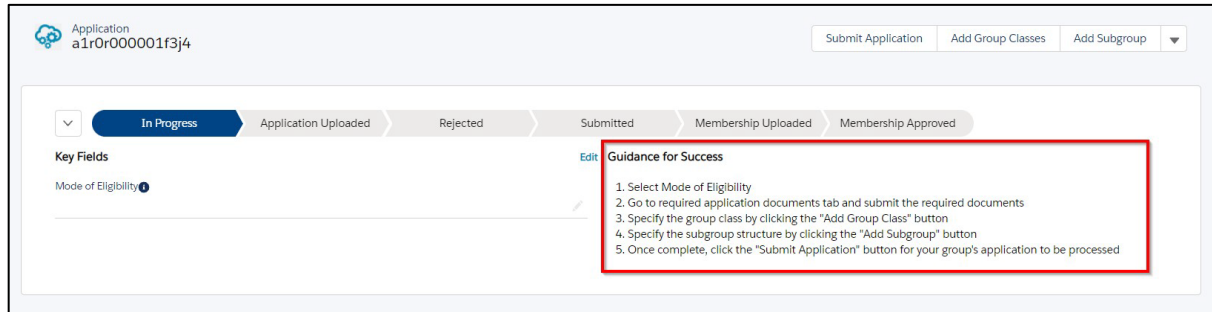
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## Purpose

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

## Application Process

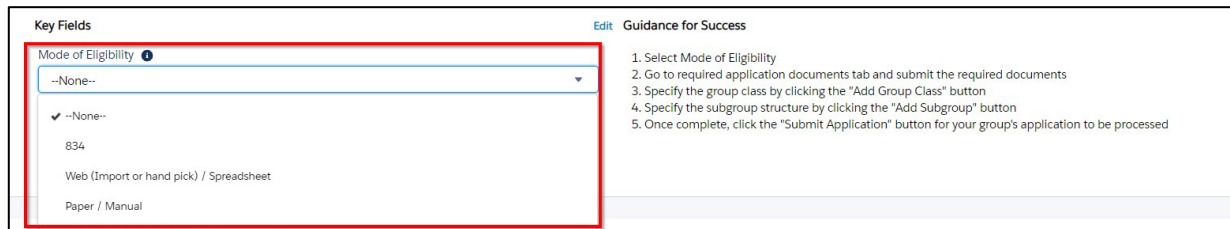
Once you accepted your quote, the employer application screen will display, and you will see the **Guidance for Success**.



The screenshot shows the application interface for application ID a1r0r000001f3j4. The status is 'In Progress'. A 'Guidance for Success' box is highlighted with a red border, containing 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.



The screenshot shows the 'Mode of Eligibility' dropdown menu. The selected option is '--None--'. The dropdown list includes the following options:

- None--
- 834
- Web (Import or hand pick) / Spreadsheet
- Paper / Manual

The 'Guidance for Success' box from the previous screenshot is also visible on the right side of the screen.

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

**Details** 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

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**Details** Required Application Documents

**APPLICATION DOCUMENTS** 5

<p><b>VEC Report</b></p> <p>Due:</p> <p>No Files Yet</p>	<p><b>Employer Group Application</b></p> <p>Due:</p> <p>No Files Yet</p>	<p><b>Binder Check</b></p> <p>Due:</p> <p>No Files Yet</p>	<p><b>Member Application</b></p> <p>Due:</p> <p>No Files Yet</p>
<p><b>Waivers</b></p> <p>Due:</p> <p>No Files Yet</p>	<p><b>Extra Files in Application Documents</b></p> <p>Due:</p> <p>No Files Yet</p>		

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

Application [a1r0r000001f3j4](#) Submit Application Add Group Classes Add Subgroup

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▼
In Progress
Application Uploaded
Rejected
Submitted
Membership Uploaded
Membership Approved

<p><b>Key Fields</b></p> <p>Mode of Eligibility 834</p>	<p><b>Guidance for Success</b></p> <ol style="list-style-type: none"> <li>1. Select Mode of Eligibility</li> <li>2. Go to required application documents tab and submit the required documents</li> <li>3. Specify the group class by clicking the "Add Group Class" button</li> <li>4. Specify the subgroup structure by clicking the "Add Subgroup" button</li> <li>5. Once complete, click the "Submit Application" button for your group's application to be processed</li> </ol>
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A message will display indicating your application was submitted and will workflow to the Sentara Health Plans 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.

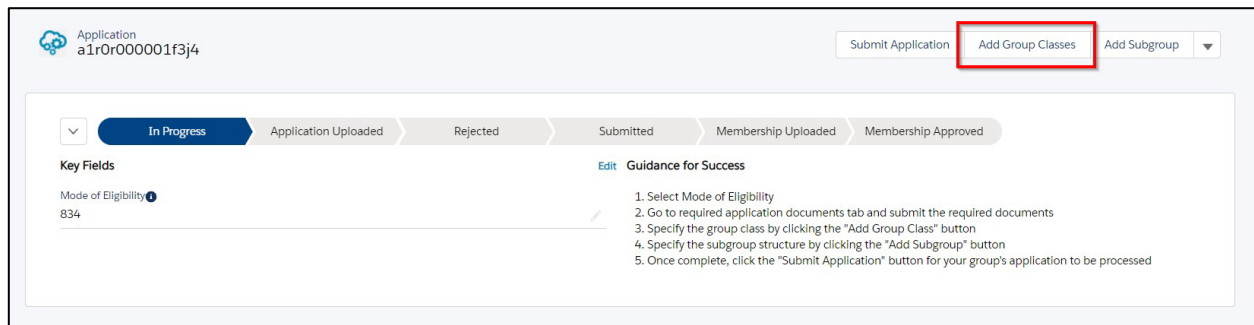
Thank you for choosing Optima Health!

[Next](#)

## Add Group Class

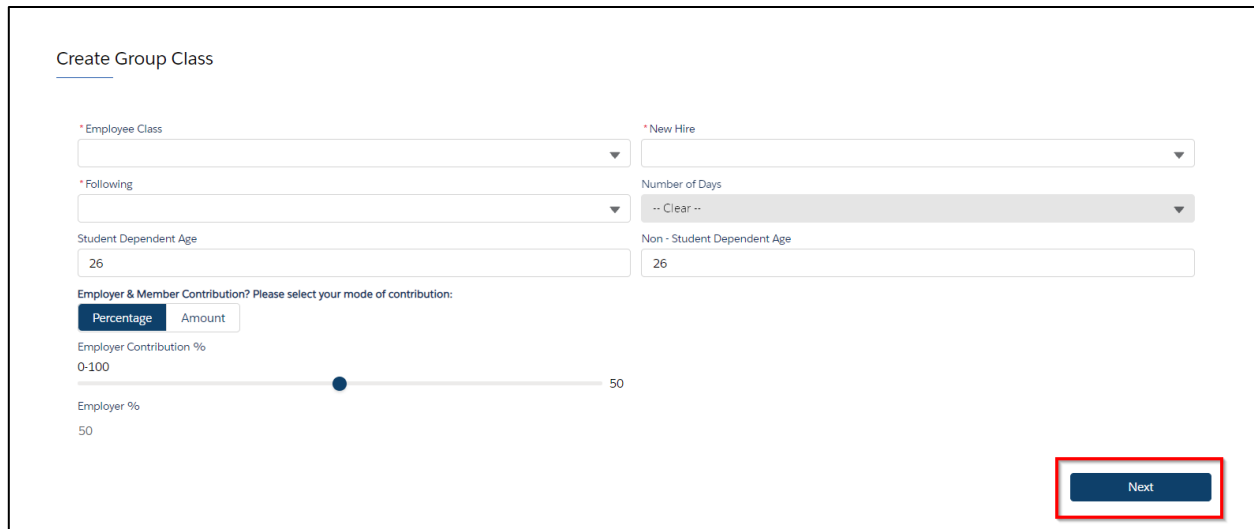
Adding a group class is not required but the steps on how to do this task are below.

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



The screenshot shows the top of the application interface. At the top right, there are three buttons: "Submit Application", "Add Group Classes" (highlighted with a red box), and "Add Subgroup". Below this is a progress bar with steps: "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 a list of five numbered instructions.

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



The screenshot shows the "Create Group Class" form. It includes several dropdown menus: "Employee Class", "New Hire", "Following", and "Number of Days" (set to "-- Clear --"). There are also input fields for "Student Dependent Age" (26) and "Non - Student Dependent Age" (26). Below these is a section for "Employer & Member Contribution?" with a slider for "Employer Contribution %" set to 50%. At the bottom right, a "Next" button is highlighted with a red box.

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



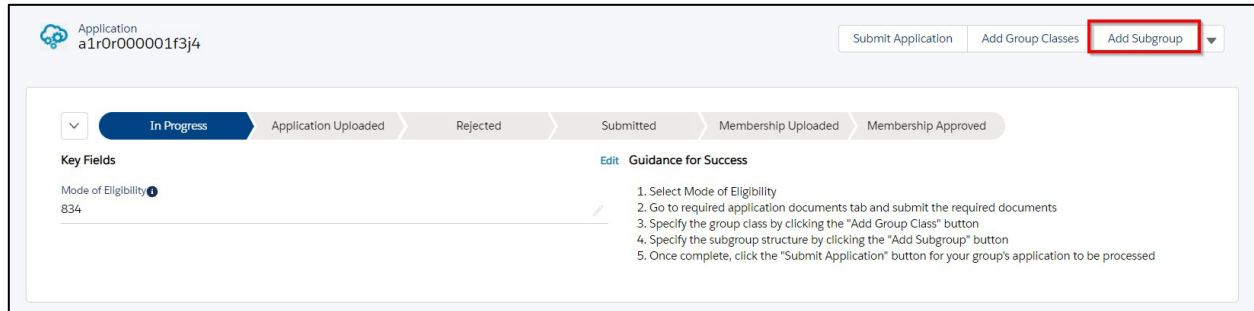
The screenshot shows a confirmation message titled "Group Class Created". The text below reads "Group class has been created for Group Test 15". At the bottom right, a "Finish" button is highlighted with a red box.

## 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

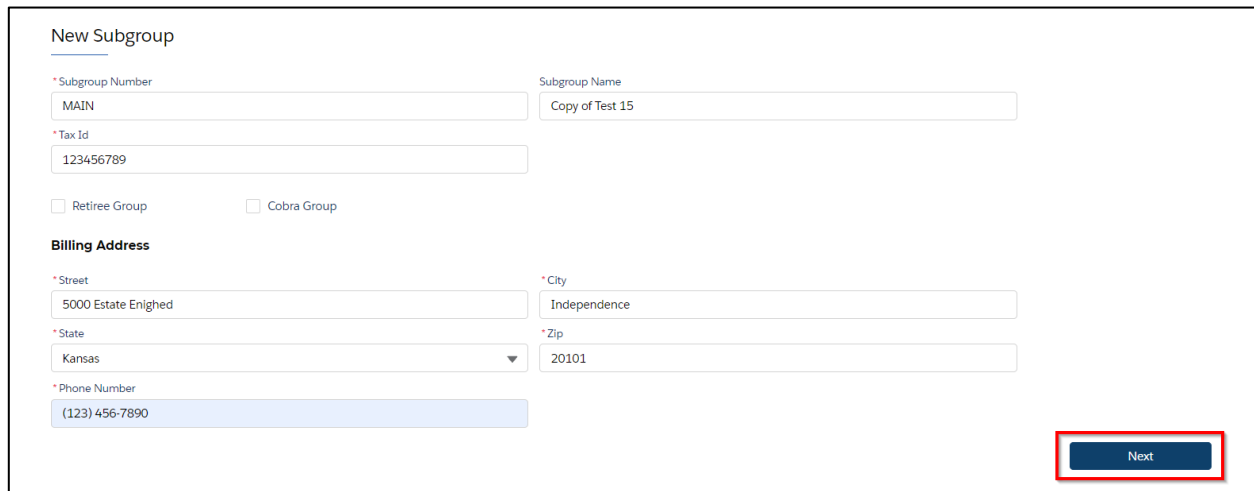
**Key Fields**

Mode of Eligibility 834

**Guidance for Success**

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**