Broker User Guide –

Book of Business and Commission Activity

Table of Contents

Purpose

The purpose of this user guide is to show you how 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.

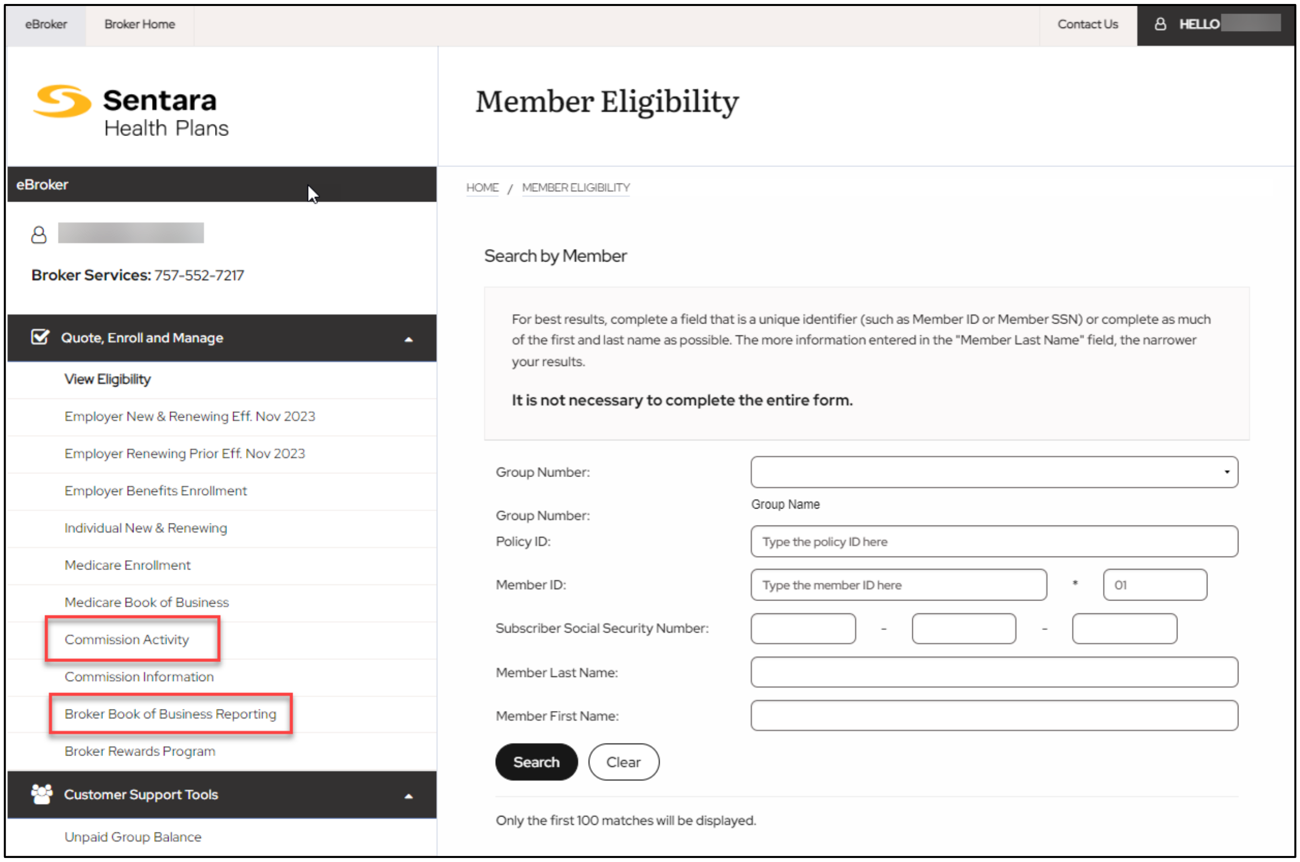
Level of Access

User Access Permission Levels:

- ***Agent Access*****:** User has access only to their Book of Business and Commissions. (Default)
- ***Gatekeeper Access*****:** Allows an Agent to see all Agents' Book of Business and Commission information under their Agency.
- ***General Agent Access:*** Allows a General Agency access to view all Sub Agencies and Agents Book of Business and Commission Reporting.
- *An Authorization Form will be required to change level of access.*

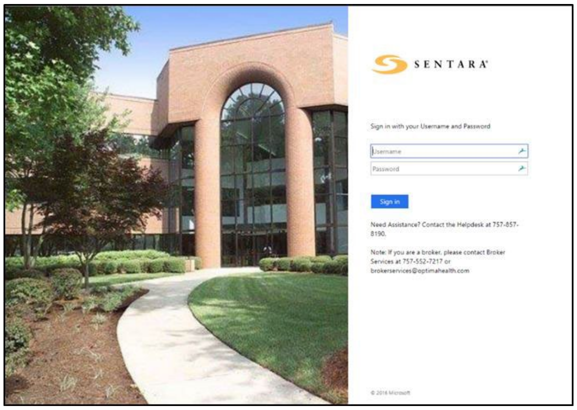
How to Access

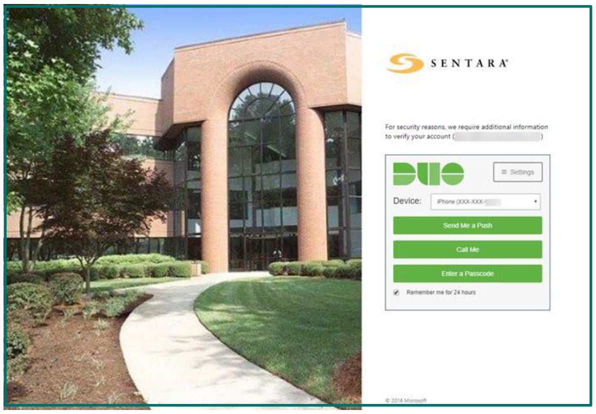
Simply sign into the broker portal, select either Broker Book of Business Reporting or Commission Activity from the left-hand navigation to access your reports.



Duo

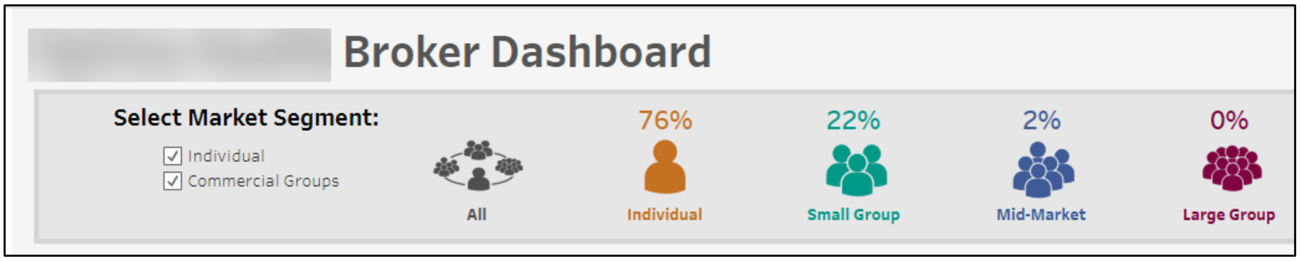
You will be prompted to sign in again and authenticate using Duo.

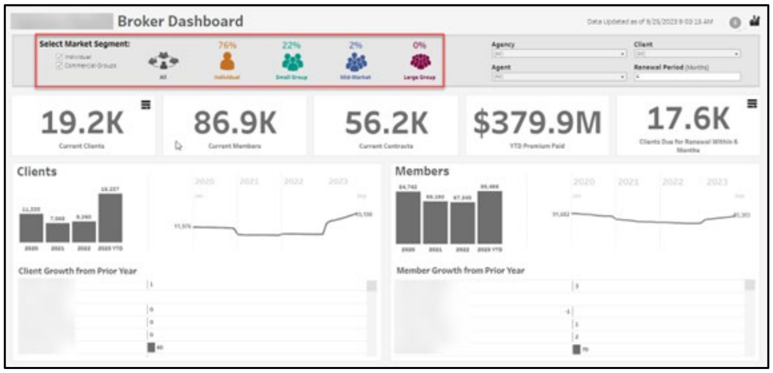




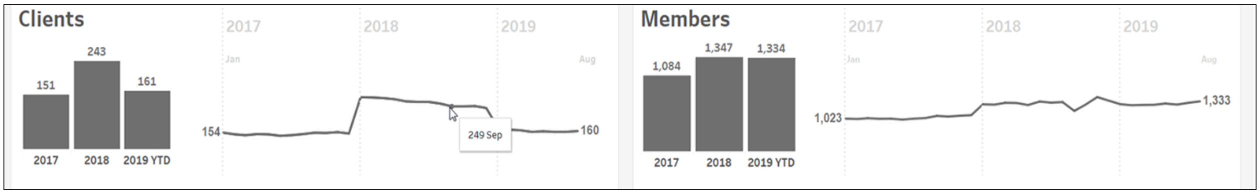
Broker Homepage/Dashboard

Your Dashboard provides a summary and trend of clients and members that can be filtered by Market Segment. On the Dashboard Homepage, Total Client and Member growth from Prior Year is displayed by a bar graph. By Agent, client and membership growth from prior year is listed.





By moving your mouse over the line graph, you can view the total Group and Member growth by a particular month.

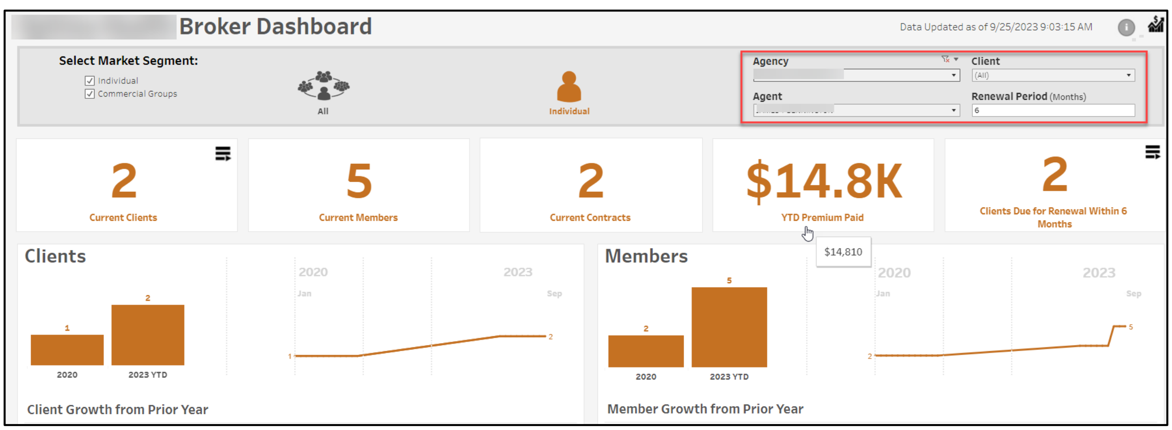


Market Segment

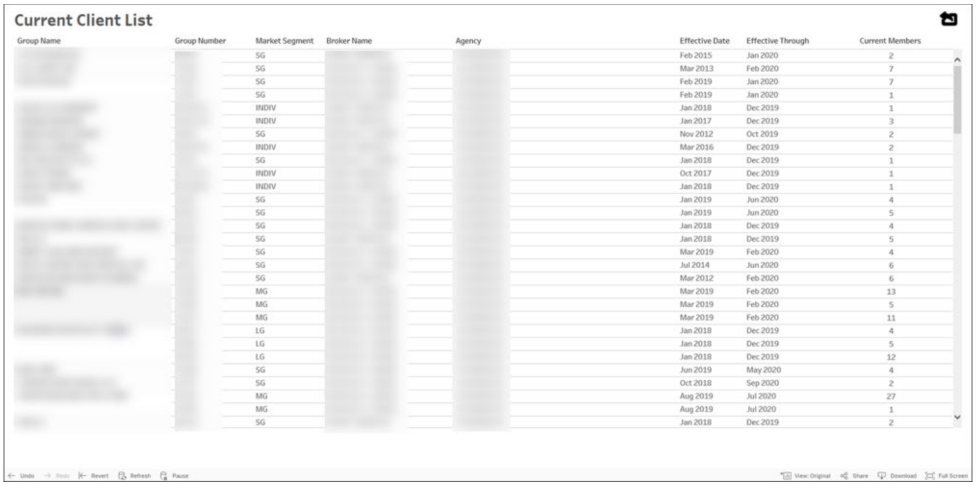
In the market segment section, you can select only the market segment you would like to review. Each segment size will display only if you have current business for that segment. If you select to **"include"** Individual, any Individual Product policies will be included with all group size segment. If you select to **"exclude"** Individual, only your total groups will show.

Current Clients

Current Clients will display the total number of your current Clients.

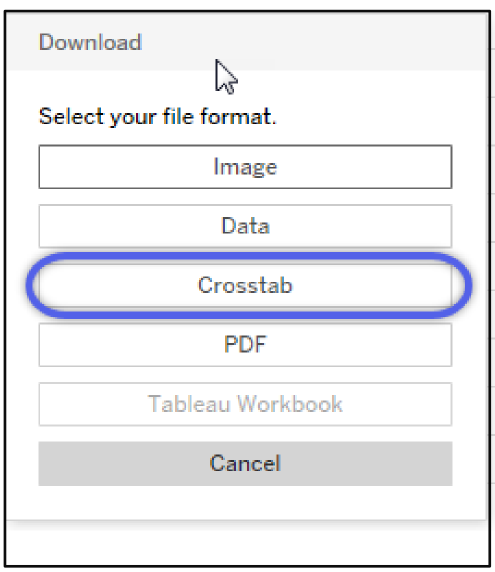


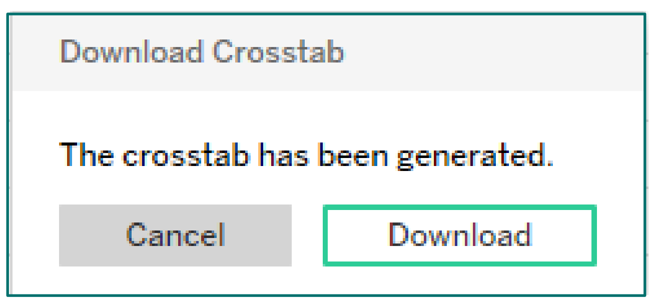
To view all Clients, or a particular Client segment, select the icon to the top right. You can download your Current Client list in Excel. Click one of the column names and select the "Download" icon on the bottom right of the screen.


Current Client List

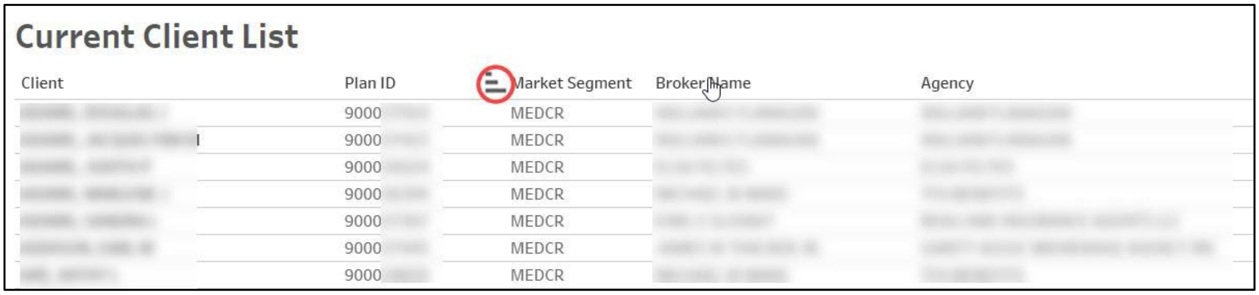
Group Name	Group Number	Market Segment	Broker Name	Agency	Effective Date	Effective Through	Current Members
		SG			Feb 2015	Jan 2020	2
		SG			Mar 2013	Feb 2020	7
		SG			Feb 2019	Jan 2020	7
		SG			Feb 2019	Jan 2020	1
		INDIV			Jan 2018	Dec 2019	1
		INDIV			Jan 2017	Dec 2019	3
		SG			Nov 2012	Oct 2019	2
		INDIV			Mar 2016	Dec 2019	2
		SG			Jan 2018	Dec 2019	1
		INDIV			Oct 2017	Dec 2019	1
		INDIV			Jan 2018	Dec 2019	1
		SG			Jan 2019	Jun 2020	4
		SG			Jan 2019	Jun 2020	5
		SG			Jan 2018	Dec 2019	4
		SG			Jan 2018	Dec 2019	5
		SG			Mar 2019	Feb 2020	4
		SG			Jul 2014	Jun 2020	6
		SG			Mar 2012	Feb 2020	6
		MG			Mar 2019	Feb 2020	13
		MG			Mar 2019	Feb 2020	5
		MG			Mar 2019	Feb 2020	11
		LG			Jan 2018	Dec 2019	4
		LG			Jan 2018	Dec 2019	5
		LG			Jan 2018	Dec 2019	12
		SG			Jun 2019	May 2020	4
		SG			Oct 2018	Sep 2020	2
		MG			Aug 2019	Jul 2020	27
		MG			Aug 2019	Jul 2020	1
		SG			Jan 2018	Dec 2019	2

A new box will open asking you to select your file format. Select **Crosstab** to download the list to an Excel file. Select **download** to download the file.

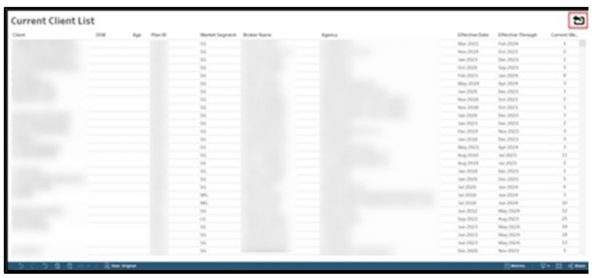




Using the “**Sort**” symbol, you can sort your Current Client List by Group Name.

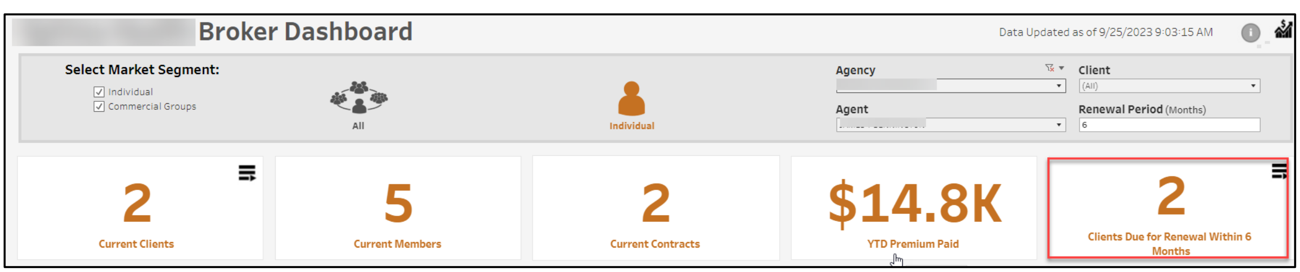


To return to the Dashboard, use the icon on the top right.

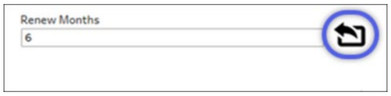


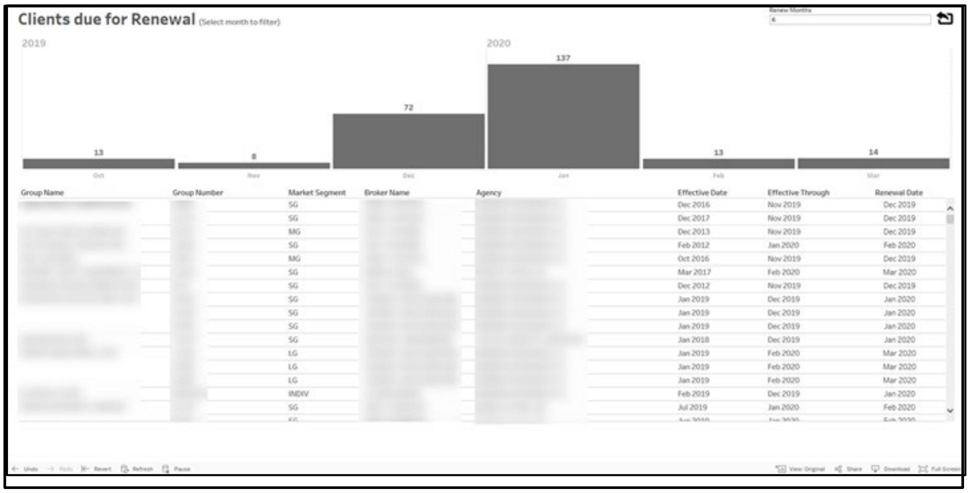
Clients Due for Renewal

You can view your current Clients by renewal period. The default is 6 months but can be changed to any value by changing the timeframe in the “Renewal Period” field. To view your list of Groups, use the icon in the top corner.



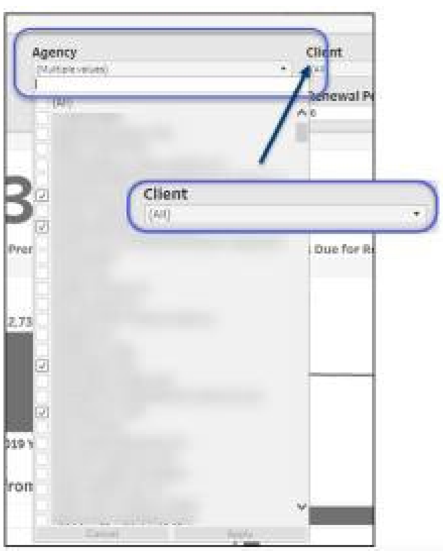
You can change the timeframe by number of months under Renew Months. You can also select a month to view only the groups due for renewal during that month.



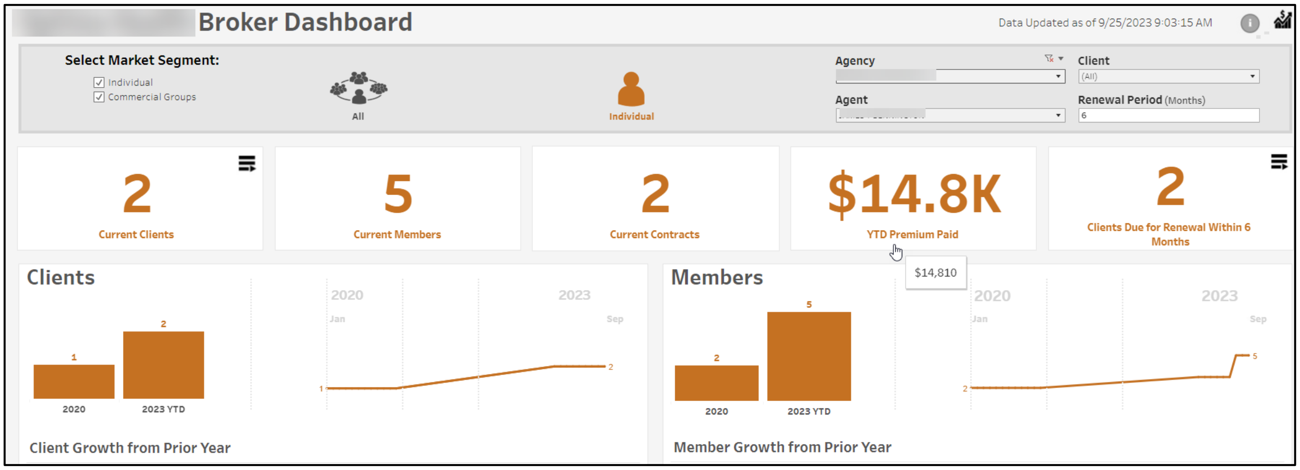


Filtering by Agency, Agent & Client

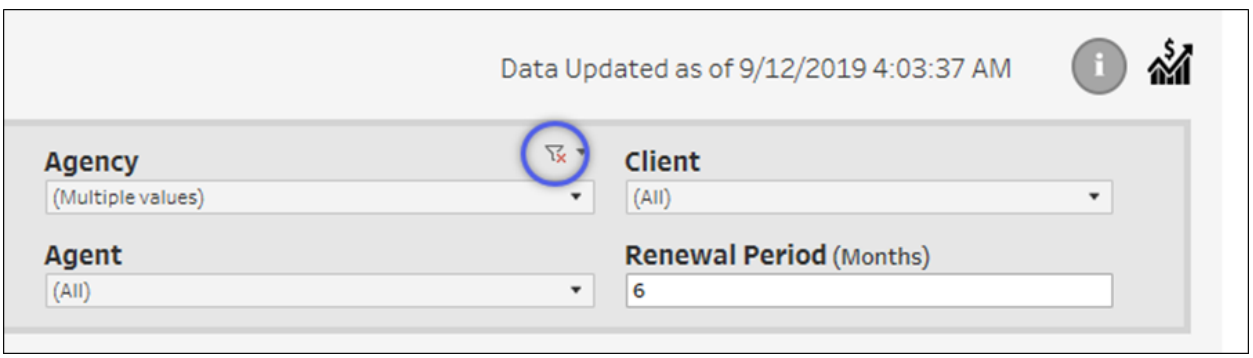
If you are with a General Agency, all sub-agencies will display under the Agency option. Using the select menu, you can view All agencies, check a few, or view only one. To search for a particular Agency or Agent, use the text box and enter the name. Use the Client drop down list to filter and select a specific client. All Clients from the reporting period displayed on the Dashboard report display here.



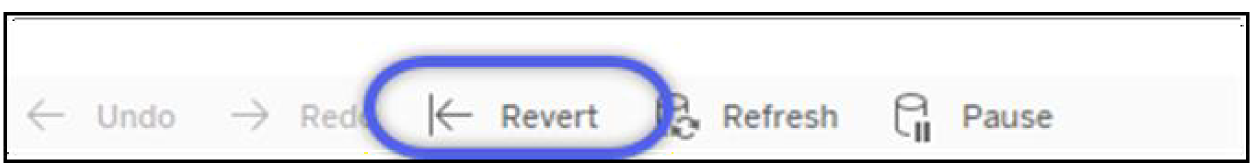
After selecting a group or client, you will see current membership, YTD premium paid and any member growth from the prior year.



To remove the filter, select the **icon above the drop-down arrow**.

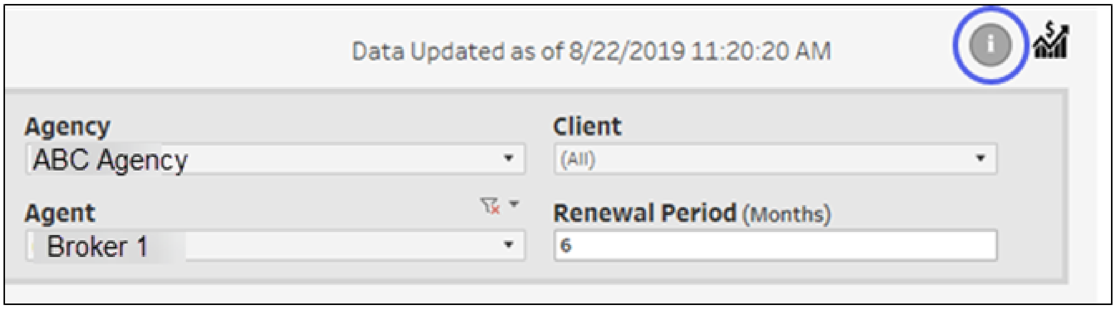


You can also use Revert to return to your original homepage.

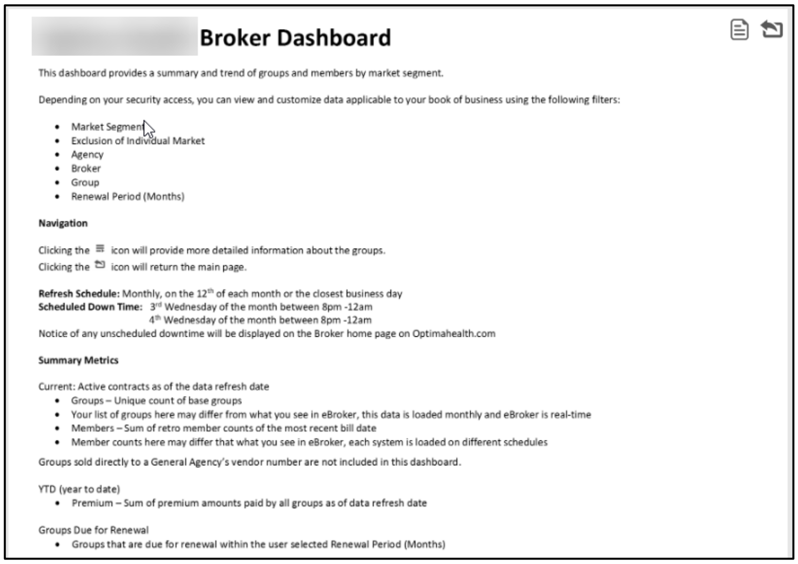


Report Specifications/Caveats

Select the icon in the top right to go to the Report Specifications/Caveats page. Here you will find additional information about the reports.



Select the icon in the top right to return to your Dashboard.



Broker Dashboard

This dashboard provides a summary and trend of groups and members by market segment.

Depending on your security access, you can view and customize data applicable to your book of business using the following filters:

- Market Segment
- Exclusion of Individual Market
- Agency
- Broker
- Group
- Renewal Period (Months)

Navigation

Clicking the icon will provide more detailed information about the groups.
Clicking the icon will return the main page.

Refresh Schedule: Monthly, on the 12th of each month or the closest business day
Scheduled Down Time: 3rd Wednesday of the month between 8pm -12am
4th Wednesday of the month between 8pm -12am
Notice of any unscheduled downtime will be displayed on the Broker home page on Optimahealth.com

Summary Metrics

Current: Active contracts as of the data refresh date
- Groups – Unique count of base groups
- Your list of groups here may differ from what you see in eBroker, this data is loaded monthly and eBroker is real-time
- Members – Sum of retro member counts of the most recent bill date
- Member counts here may differ that what you see in eBroker, each system is loaded on different schedules

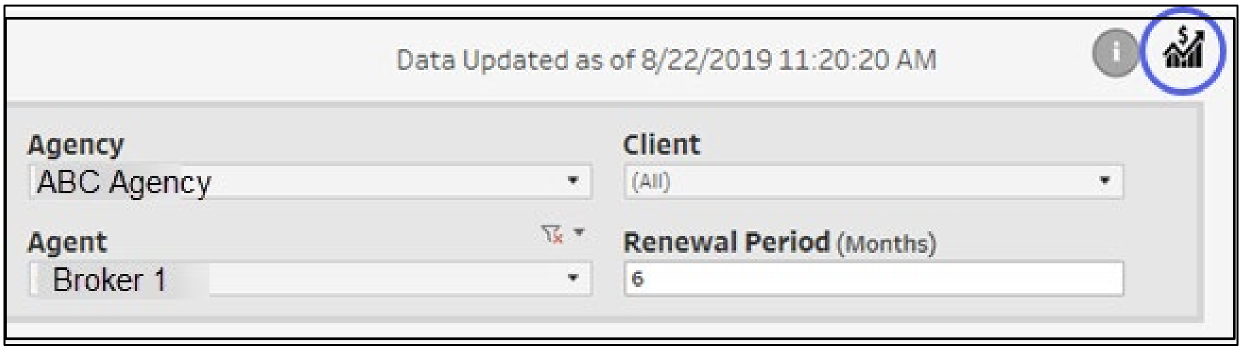
Groups sold directly to a General Agency's vendor number are not included in this dashboard.

YTD (year to date)
- Premium – Sum of premium amounts paid by all groups as of data refresh date

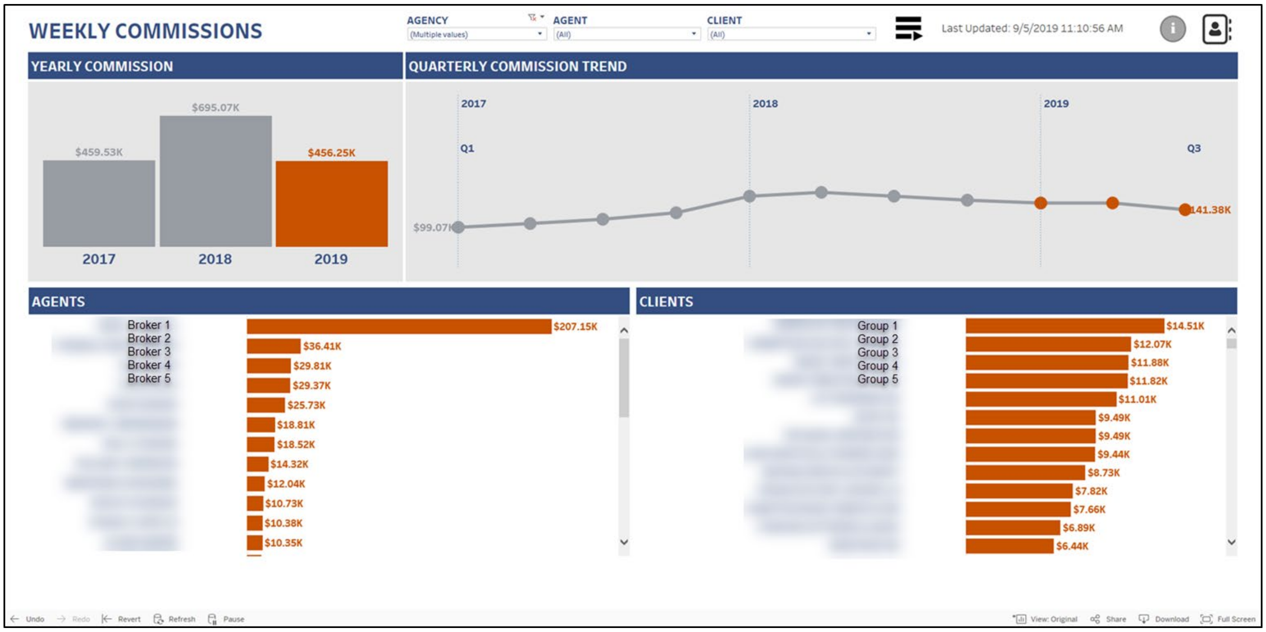
Groups Due for Renewal
- Groups that are due for renewal within the user selected Renewal Period (Months)

To return to your Dashboard, select the icon in the top right hand of your screen.

When you are done viewing your Book of Business Reports and want to view your Commission Reports, select the icon  in the top right corner and you will be taken directly to your Commission reporting.



Commissions Homepage/Dashboard



Weekly Commissions

From the Commissions Dashboard, you can see your weekly commissions paid for the past two years and for year to date. Your Dashboard will also provide you a Quarterly Commission Trend, Yearly Commissions paid, and can be sorted by Agent and Client.

Commissions

To view total Commission paid by quarter, you can mouse over the line graph and select the quarter you wish to view.

Filtering by Agency, Agent & Client

You use the same method and icons as you do when filtering in Book of Business reporting.

Undo Click Undo at the bottom of the page to go back to the previous view.

Clicking this icon will provide detailed information about the Commissions.

Clicking this icon will undo the Filter for the item(s) selected.

Revert Clicking this icon will undo all filters.

Clicking this icon will return you to the main page.

Click to view report specifications/caveat page.

Report Details

The Report Details page shows a list of all Commission payments made. You can filter by payment period, check date, and/or Client. The default payment period is the last 3 months. You may see a null value or zero under the Market Segment, Contract Count, and Retro Count columns if commission payment was paid based on a percentage of premium. You may also see a null or zero value under the Premium column if the commission payment was paid based on billed contracts.