Using BrokerOffice

What is the sign-in process to access BrokerOffice and HealthCare.gov?

- Sign-in to optimahealth.com/brokers using your Optima Health username and password.
- Click on **Individual Plans**, then **Quote and Manage Individual Plans Applications**.
- Click on the **Login to Enrollment Portal** under **Quote & Enroll New Business**.
- Sign-in to BrokerOffice using your BrokerOffice username and password (username is the same as your Optima Health username).
- Continue steps to begin application process.
- At the **Apply for Health Cost Savings** page, click **Continue** to be directed to HealthCare.gov.
- After you select **Start a Client's New Application** or **Look Up a Client's Existing Application**, you will be asked to log in to your account. Your CMS username and password are required.
- Lastly, when you get to the **Household Contact Information** page, you will be required to enter your National Producer Number (NPN) to continue.

How do I change my username/password and contact information in BrokerOffice?

Your username for BrokerOffice is the same as your username for optimahealth.com and cannot be changed at this time. For convenience, we recommend you update your password to match your optimahealth.com password.

- Sign in to your BrokerOffice account by going to http://www.brokeroffice.com.
- Enter your username and password.
- If you have forgotten your password or your sign in is not successful, please click **Forgot your Password?** below the **Login** button and follow the prompts.
- Click the **Home** tab.
- Click the **Edit User Info** link on the orange bar at the top of your screen.
- Modify the appropriate fields.
- Click the **Submit Request** button to save and enable your changes.

How do I clear my browser's cache and cookies?

As you browse the Internet, websites and web applications may use browser cookies and the browser cache to store information in order to improve your experience. Clearing browser data is a basic troubleshooting step that can resolve a variety of issues. Find the browser name below for a step-by-step guide on clearing cache and cookies.

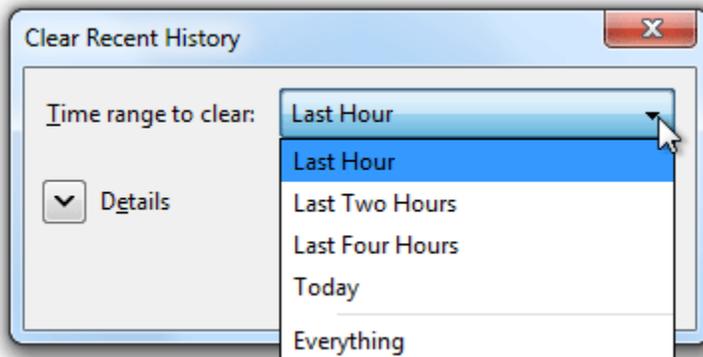## Using BrokerOffice

Chrome:

Delete all your data

- In the top-right corner of Chrome, click the Chrome menu ≡.
- Select **More tools** > **Clear browsing data**.
- In the dialog that appears, select the checkboxes for the types of information that you want to remove.
- Use the menu at the top to select the amount of data that you want to delete. Select **beginning of time** to delete everything.
- Click **Clear browsing data**.

Delete specific items from your browsing data

Instead of deleting entire categories of your browsing data, you can pick specific items to delete.

Firefox:

- Click the menu button ≡ , choose History, and then Clear Recent History….
- Select how much history you want to clear:
  - ○ Click the drop-down menu next to **Time range to clear** to choose how much of your history Firefox will clear.

  - ○ Next, click the arrow next to **Details** to select exactly what information will get cleared. Your choices are described in the What things are included in my history? section above.

Using BrokerOffice
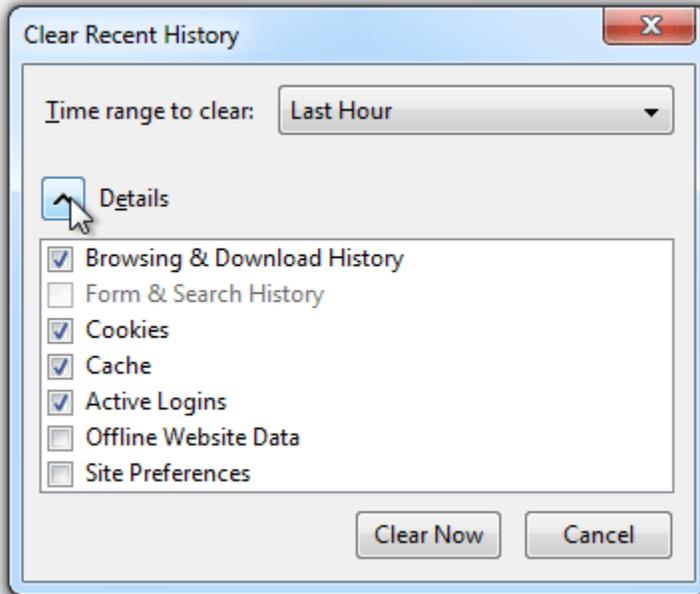
- Finally, click the Clear Now button. The window will close and the items you've selected will be cleared.

Safari:
In OS X Yosemite, you can delete website data for the past hour, or past few days if websites or pages stopped loading recently.
- Choose **History > Clear History and Website Data**.
- In the sheet that appears, choose the range of data you want to remove from the **Clear** pop-up menu.
- Click Clear History.
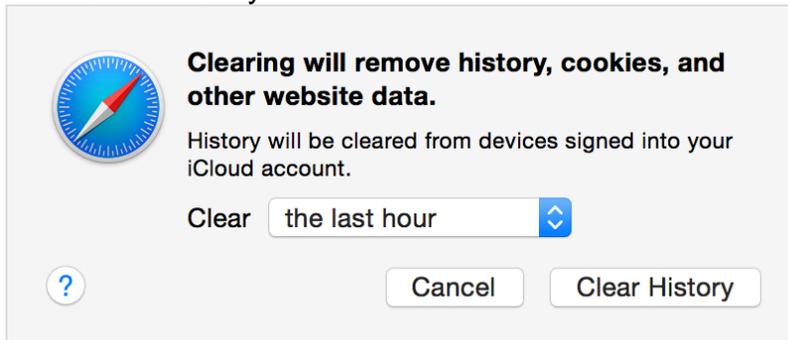
If you want to remove website data for all of the sites and pages you've ever visited, choose "all history" from the **Clear** pop-up menu. The option to **Remove All Website Data** in the **Privacy** pane of Safari preferences does this, too. These options also reset your browsing history and Top Sites.

How do I import leads into Broker Office?

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- Log in to your BrokerOffice account at http://www.brokeroffice.com
- Click on the **Leads** tab.
- In the orange bar, click on **Import Leads**.
- Click on the **Browse** button to locate and select the file you would like to import.
- Type the character that is used to separate each field in your import file (This is normally a comma) into the Separator field. If you are not sure what this is, then do not edit this field.
- Enter the character used to enclose fields (This is normally the double-quotes character - ") into the Enclosing Character field. If you are not sure what this is, then do not edit this field.
- Choose the appropriate lead type in the **Config ID** dropdown menu and click **Continue** to go to the next screen.
- You will be presented with a list of all available import fields. Drop down the box for each field to match it with the correct field name in your CSV file. When completing this screen, please take note of the following points:
  - Some fields in these options might be fields that you do not need or fields that are used by some users or systems only. If there are certain fields that you do not want to import, simply leave those fields blank.
  - Field names beginning with "insured_" are used for the applicant (insured_1), with the exception of first name (first_name) and last name (last_name). The spouse (insured_2) and dependents (insured_3 onwards) use the "insured_" field names only.
  - Field names beginning with "address_" are used for the address (address_1 is used for the primary address and address_2 is used for the secondary address).
- Once you have finished mapping your import fields, click the **Import** button at the bottom of the page.
- When the import is complete your leads will then show in the **Leads** tab of BrokerOffice!

How do I export leads from the BrokerOffice database?

Leads can be exported from BrokerOffice using the **Bulk Operation** function. You can reach this through your **Advanced Search**:

- Log in to your BrokerOffice account at http://www.brokeroffice.com
- Select the **Reports** tab and click **Search Leads**.
- You will be presented with our search form. Enter criteria to search for the leads that you want to export.
- To export all leads within a certain timeframe, simply select the date range using the **Created Between** fields and leave all other fields blank.
- Once you have entered your search criteria click **Search**.
- You will see your search results displayed in increments of 20 leads per page. These are the leads that you will be able to export based on your search criteria.
- In the **Search Results** section, answer the question "What would you like to do next?" by selecting **Export Leads** from the drop down menu. When ready, click **Perform Bulk Operation** to complete the export.

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- Leads will be exported as a CSV (Comma Separated Value) formatted file and saved to the folder designated by your Web browser for downloads. Many different types of software can make use of this type of file. It is also possible to open this file directly with Microsoft Excel or another compatible spreadsheet application to view your exported leads.

Note: If you selected a large number of leads, it may take a few moments to prepare the file. Do not click more than once.

How do I change the status of my leads?

Setting and changing the Status field of your leads is one of the easiest ways to track where any particular lead is in your sales process. You can update the status on one lead at a time, or you can use **Advanced Search** to update the status on an entire group of leads.

Setting/Changing the Status field for a single lead

- From BrokerOffice, navigate to the **Lead View/Edit** page for the lead you need to change the status.
- Click the **Status** field and select the status for the lead.

The change will automatically be saved as soon as you click out of that field, so there is no need to save the lead.

Setting/Changing the Status field for a group of leads

To change the status of an entire group of leads you will need to search for the leads that you want to change using **Advanced Search**:

- Click the **Reports** tab.
- Choose **Search Leads.**

- Enter criteria to search for the leads that require a status change.
- Click **Search Now** to find the leads.
- Using the check boxes to the left, select which leads you would like to change the status.

Note: If you want to update all of the leads in your search results, check the box in the top row.

- At the top of the **Advanced Search Results** page, select **Change Lead Status** from the drop down menu, followed by **Perform Bulk Operation**.
- Select the desired status that you want change the leads to in the drop-down menu provided.
- Click **Change Status** and all of the leads you selected will be changed to the new status.

Note: You are only able to change the status of 150 leads at a time; if you need to update the status on more than 150 leads, please submit a support case.

Can I run an anonymous quote from BrokerOffice?

Yes. To run an anonymous or quick quote:
- Sign in to your BrokerOffice account.

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- Create a lead as you normally would, but use your name, zip code, and date of birth.
- Create a dummy email address using LastNameZip@noreply.gohealth.com format.
- Open Marketplace and change the demographic data to match your client information.
- Use this same lead for additional anonymous quotes and update demographic data accordingly.

Can I filter my plans?

Yes. The Agent/user has the capability to filter the plans by Carrier, Deductible, Copayment, Max Out-Of-Pocket, Plan Type, Plan Categories, Monthly Premium, and Tax Credit Eligible.

Is there a way to sort my plans?

Yes. You can choose from the drop down by **Sort Plans by**. The options available are:
- Premium
- Plan Category
- Maximum out of Pocket
- Copayment
- Deductible
- Plan Type

Can I submit plans for leads that are not on my account?

You will be able to view/edit the lead, but clicking the 'Open Marketplace' button for any lead belonging to a broker will result in an error. BrokerOffice only allows you to complete the shopping and enrollment process for any leads that are directly assigned to your account.

Can I edit Applicant/Spouse or Dependent info?

Yes. You can edit the information. Click on the **Edit** link by the **Quote results** and update the information.

Showing **55** of **95 plans** starting at **$174.05 a month** .
Quote results for **1 applicant** in IL. (**Edit**)
Estimated monthly cost savings of **$93.00** applied. (**Edit**)

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How many plans can I compare at one time?

You can compare up to four (4) plans at one time.

Can I change the household size and income?

Yes. Click the **Edit** link by **Estimated monthly cost savings of $$$** applied and make the necessary changes.

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How do I know if a plan is eligible for a tax subsidy?

A blue icon with a money symbol will be shown beneath plans that are eligible for a tax subsidy.

How do I know if a plan is eligible for an HSA?

A pink piggy bank icon will be displayed beneath plans that are HSA eligible.

Where can I find specific details of the plan such as coverage for hearing aids or specialist visits?

Each plan has a section that says **Plan Details** and by clicking on the **View** link, you can access more detailed information regarding coverage, deductibles, and other details, including details of a selected plan before enrollment by clicking on the **View**

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Details link below the **Effective Date**. You can also download a copy of the plan's brochure from this link.

Who do I contact for technical issues I encounter while accessing my BrokerOffice account?

With help resolving technical issues with BrokerOffice, please email support@norvax.com.

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