

Broker Support & Appointments FAQs

Broker Appointment Fee: There is a \$50 fee for appointment. Agency and Agent requests submitted on the same submission will only be charged one appointment fee. If an appointment is terminated, requests to become reappointed will be required to submit using the online process and the appointment fee will be charged a second time.

LOGIN ISSUES

1. How can I get login assistance?

For login issues related to your username/password or account expirations, please contact brokerservices@optimahealth.com for further assistance.

AGENT OF RECORD CHANGES (AOR)

2. How do I request an Agent of Record (AOR) change?

An agent of record (AOR) is an individual or a company authorized to represent an individual in the purchase and maintenance of insurance coverage with a designated insurance carrier. For Individual Product plans, you may request an AOR change by emailing IndividualSales@optimahealth.com. For employer groups, you may request an AOR change by emailing healthplans@optimahealth.com.

We will accept emails or letters as acceptable requests.

NAME/ADDRESS/PROFILE CHANGES

3. How can I update a name change or my contact information?

You may request name changes or update contact information by emailing healthplans@optimahealth.com. Please make sure to provide a copy of valid documentation that verifies the requested changes i.e. marriage certificate, driver's license, etc.

COMMISSIONS STATEMENTS AND PAYMENTS

4. How can I get access to view commission statements online? I am missing group-specific payment information in my commission statement. How do I request this group number addition or correction?

If you have already signed up to use the commission statement feature, and are still encountering access issues, please contact BrokerInquiryMailbox@sentara.com for further assistance

Please check out the online tutorial for more information:

http://media.sentara.com/optimahealth/MOSS-BOIP-Commissions-Demo/MOSS_BOIP_Commissions_demo.htm

5. I have a question regarding my commission payment?

For questions about commission payments, please contact BrokerInquiryMailbox@sentara.com for assistance.

APPOINTMENTS

6. How can an agency or individual sign up for an appointment?

Individuals and agencies interested in an appointment may submit a new appointment request online at www.optimahealth.com/brokers. Scroll down to Appointments, and fill out a Broker Appointment Form. Please ensure you have all required documentation and the correct signatures to fulfill any new appointments. Make sure you are adding backslashes on all electronic signatures when prompted in the appointment form application i.e. **John Doe**

7. What documentation is required to sign up for appointments?

To complete the online Broker Appointment form application, please include:

- Virginia Agent Life and Health License (required)
- Agency License (if applicable)
- Optima Health Substitute W9 (SF-W9) Form
- Broker Agreement (includes Business Associate and QHP Amendments)
- Portal User Profile (access to OptimaHealth.com secure Broker Portal)
- If an agent elects to sell Medicare, they will be contacted by the Medicare Sales team for training.
- We require all agents to work with a General Agency. If you do not have a preference and do not select a General Agency, one will be assigned for you.

- Electronic signatures must include front and back backslashes when prompted in the appointment form application i.e. \John Doe\
 - If the correct signature is not provided, the broker appointment request will not be considered and will require resubmission.

8. How can I check the status of my appointment request?

Please allow 2 weeks for an appointment. You may email us at appointment@optimahealth.com to follow-up on the status of your appointment if it has been more than 2 weeks. Please include your full name and contact information in the body of the email.

9. Do I need to appoint my agency if I am the only agent?

If commissions are being paid to your social security number, then it is not necessary. However, if your agency is licensed with the State and you are being appointed under your agency, you will need to appoint your agency as well.

10. How do I move from one General Agency (GA) to another General Agency?

Please email us at appointment@optimahealth.com to put in a GA transfer request. Include your full name and contact information in the body of the email. Optima Health will notify both the new and former General Agencies of the effective date of change.

11. How do I become a direct agent?

Please contact us at healthplans@optimahealth.com to take the next steps in becoming a direct agent.

12. How do I request to be unappointed with Optima Health?

You may request to be unappointed by contacting appointment@optimahealth.com.