

# Optima eBroker quick guide


## New Pivotal software to support multiple pharmacy options will be available May 5, the new software includes:

- Removal the ODR option from eBroker
- “Forms/Literature” button in eBroker will now bring you to “Employer Plans Summary of Benefits Documents” on [optimahealth.com](http://optimahealth.com)
- The “Product Line” report has been fixed so 5 plans show on each page and will go on to the 2<sup>nd</sup> or 3<sup>rd</sup> page with the headers and footers, the other reports were also adjusted to bring the columns and totals inline.
- Multiple Pharmacy options (on non-CHDP plans only)

### The Multiple Pharmacy Options

The “Add Plans” page hasn’t changed (plans are now in a better order)

- Select your plans as you normally would and select "Next Step / Update Quote".

Optima  Home My Profile Log Off Help

Plan Selection for: Test 123 group Apr 18, Virginia Beach

New Quote

My Groups  
My Quotes  
My Activities

Forms/Literature  
News  
HRA Cost Savings  
Calculator  
Reports

**RIDERS**

Rider	Select
Morbid Obesity Rider (MOR)	<input type="checkbox"/>
Prosthetics Rider (ALR)	<input type="checkbox"/>

**PLANS** Select All

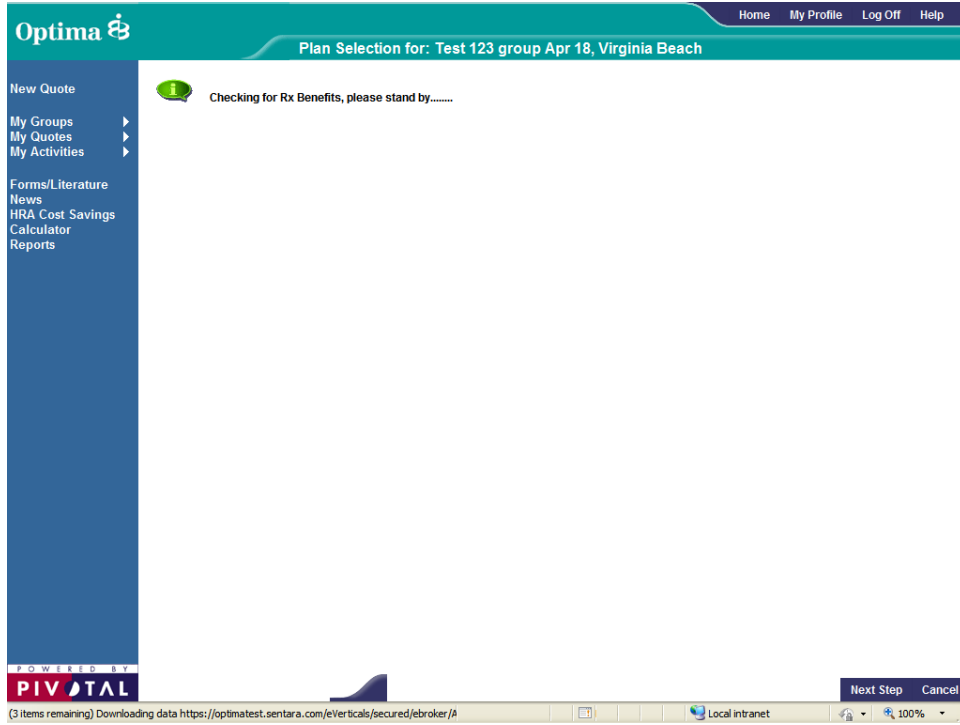
Plan Family	Type	Plan	Select?
+ Optima Vantage			
+ Optima Vantage Deductible			
+ Optima Plus			
+ Optima Equity Vantage			
+ Optima Equity Plus			
+ Optima Design Vantage			
+ Optima Design Plus			
+ Optima Design Vantage RxDed			
+ Optima Design Plus RxDed			
+ OHP Standard & Essential			
+ OHIC Standard & Essential			

POWERED BY PIVOTAL

Next Step Cancel

Done Local intranet 100%

The next screen will display **“Checking for RX Benefits, please stand by.....”** .



If the plans you selected have Pharmacy Options you will see a page that looks like this: (**new screen**)

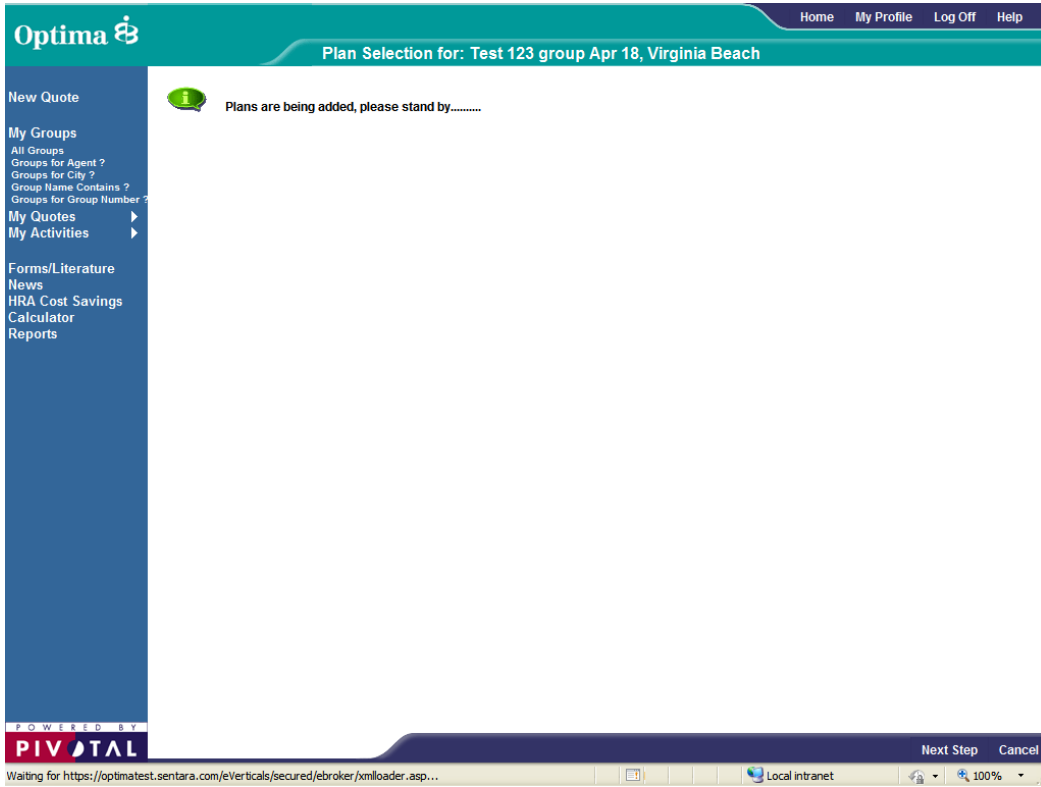
- The plan name will be displayed with the pharmacy options available. The core pharmacy option will be displayed in **bold** and is preselected. If you want only the default option, select "Next Step / Update Quote" **OR** check all the pharmacy options you want to present on the quote and select "Next Step / Update Quote".

The screenshot shows the Optima website interface. At the top, there is a navigation bar with 'Home', 'My Profile', 'Log Off', and 'Help'. Below this, a header indicates 'Plan Selection for: Test 123 group Apr 18, Virginia Beach'. The main content area is titled 'Select Pharmacy Option' and contains a table with the following data:

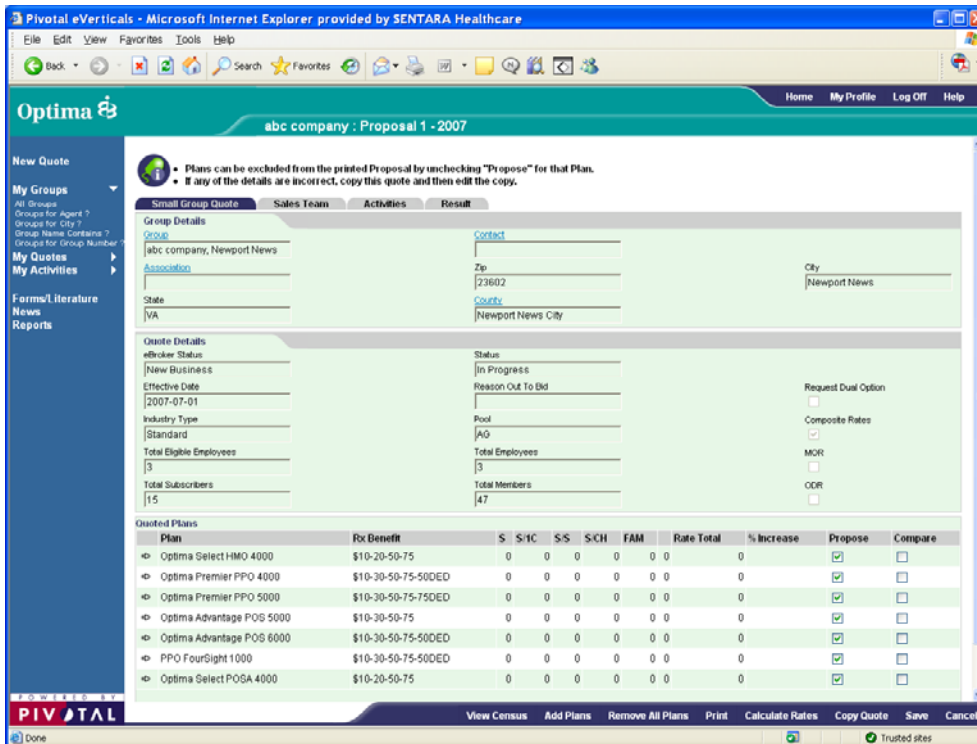
Selected Plan	Rx Benefits	Selected
Optima Vantage 10/20 (7/1/2011)	<b>\$10-20-50-75</b>	<input checked="" type="checkbox"/>
	\$10-30-50-75 w/\$150DED	<input type="checkbox"/>
Optima Vantage 10/25 (7/1/2011)	<b>\$10-20-50-75</b>	<input checked="" type="checkbox"/>
	\$10-30-50-75 w/\$150DED	<input type="checkbox"/>
Optima Vantage 20/80% (7/1/2011)	<b>\$10-30-50-75</b>	<input checked="" type="checkbox"/>
	\$10-30-50-75 w/\$150DED	<input type="checkbox"/>
Optima Vantage 25/70% (7/1/2011)	<b>\$10-30-50-75 w/\$50DED</b>	<input checked="" type="checkbox"/>
	\$10-20-50-75	<input type="checkbox"/>
	\$10-30-50-75 w/\$150DED	<input type="checkbox"/>

At the bottom of the page, there is a 'POWERED BY PIVOTAL' logo and a navigation bar with 'Next Step' and 'Cancel' buttons. The browser's address bar shows 'Local intranet' and the page is zoomed to 100%.

The next screen you will see will tell you: **“Plans are being added, please stand by.....”**

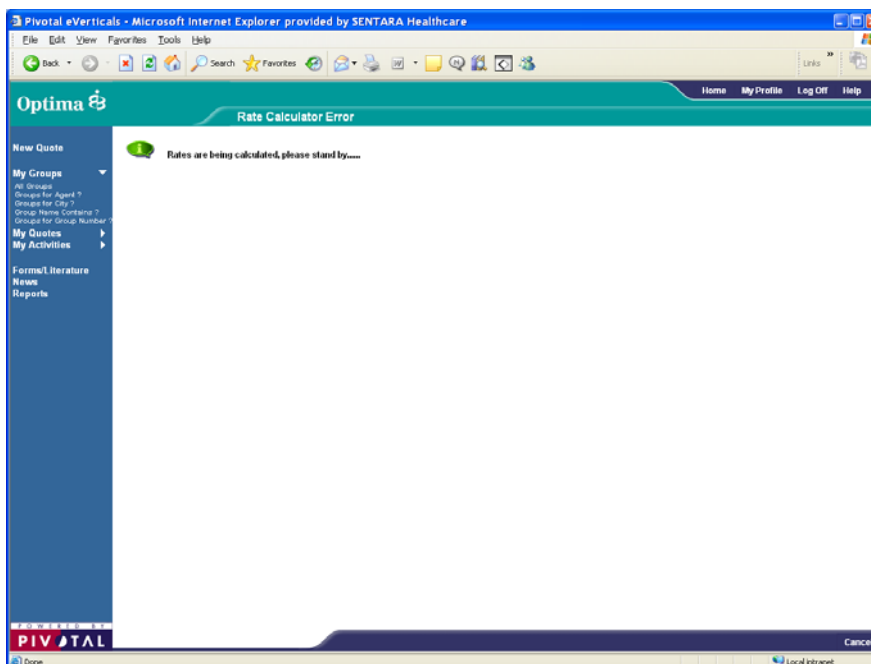


- Next you will see the Small Group Quote tab with all the plans and pharmacy option you selected.



Notice there are “zeros” for your rates- this is correct because there is another step needed to get your rates.

- Select the “**Calculate Rates**” button on this page and you will see this page telling you “Rates are being calculated, please stand by.....”.



You will now see the Small Group Quote tab with all your rates displayed.

abc company : Proposal 1 - 2007

Plans can be excluded from the printed Proposal by unchecking "Propose" for that Plan.  
 If any of the details are incorrect, copy this quote and then edit the copy.

**Small Group Quote** | Sales Team | Activities | Result

**Group Details**

Group: abc company, Newport News  
 Association: [Field]  
 State: VA  
 Zip: 23802  
 City: Newport News  
 County: Newport News City

**Quote Details**

eBroker Status: New Business  
 Effective Date: 2007-07-01  
 Industry Type: Standard  
 Total Eligible Employees: 3  
 Total Subscribers: 15  
 Status: In Progress  
 Reason Out To Bid: [Field]  
 Pool: JAG  
 Total Employees: 3  
 Total Members: 47  
 Request Dual Option:   
 Composite Rates:   
 MOR:   
 ODR:

Plan	Rx Benefit	S	S/IC	S/S	S/CH	FAM	Rate Total	% Increase	Propose	Compare
Optima Select HMO 4000	\$10-20-50-75	1354.84	461.89	1335.08	628.14	6431.32	0	10211.27	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Optima Premier PPO 4000	\$10-30-50-75-50DED	1348.44	459.71	1328.78	625.18	6401.01	0	10163.12	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Optima Premier PPO 5000	\$10-30-50-75-75DED	1283.96	437.72	1265.24	595.28	6094.90	0	9677.10	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Optima Advantage POS 5000	\$10-30-50-75	1436.28	489.65	1415.34	665.90	6817.93	0	10825.10	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Optima Advantage POS 6000	\$10-30-50-75-50DED	1385.32	472.29	1365.14	642.28	6576.08	0	10441.11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PPO FourSight 1000	\$10-30-50-75-50DED	1129.44	385.05	1112.96	523.84	5361.37	0	8512.46	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Optima Select POSA 4000	\$10-20-50-75	1617.64	551.48	1594.04	749.98	7678.79	0	12191.93	<input checked="" type="checkbox"/>	<input type="checkbox"/>

View Census | Add Plans | Remove All Plans | Print | Calculate Rates | Copy Quote | Save | Cancel

## Proposal Report update

- The “product line” report has been redesigned so the report will now print over many pages if needed
- All other reports have been reformatted for additional clarity