

Broker Website Reference Guide

DeltaDentalVA.com helps you manage your existing book of business and create new and renewal quotes easily and efficiently with 24-hour access that accommodates your schedule.

As you use our site, some sections will appear in pop-up windows or new tabs, depending on your browser. Make sure you have pop-up blockers turned off, or have customized your blockers to accept pop-ups from DeltaDentalVA.com. For the best viewing, we recommend you use Firefox as your browser.

Create Your Account

- From DeltaDentalVA.com, click **Brokers**.
- Click **New Users Register Here**, under “**Brokers Login**” at the top left corner of your screen, fill out all requested fields, then click **Create Account**.
- A confirmation screen will appear if your account has been created successfully. Click **Return to Broker Page** to log in.

Forgot Password?

- From the Broker home page, click **Forgot Password** under the Brokers login boxes. A screen will appear asking you for your user name.
- Enter your user name and click **Verify Account**.
- You will then be asked to provide the answer to your security question. Enter the answer and click **Reset Password**.
- The password is reset and your new password is sent to you at the email address you provided during registration.

Forgot User Name?

To retrieve your user name, call Marketing Administration at 888.335.8216. You will be asked to verify the keyword you chose when you set up your web access.

Log into the Secure Broker Website

- From DeltaDentalVA.com, click **Brokers**.
- Enter your user name and password in the **Broker Login** boxes at the top left corner of your screen and click **Login**.
- Your secure Broker home page will appear.
- After logging in for the first time, you may change your password by clicking **Edit Account** at the top left corner and following the instructions.

What You Can Do Once You Log In

Create A Quote

- From the secure **Broker** home page, click **Create A Quote**.
- Complete all required fields, then click **Submit** to begin configuring your quote.

Configure A Quote

- Using the drop down menu, select the plan(s) you would like to quote. Next, select the options available for each selected product.
- Once all options have been selected, rates will appear at the bottom of the column. Click **Save and add to Rate Quote**.
- Add additional plans by changing the plan name and options from the drop down menu, and then clicking **Save and add to Rate Quote** under each plan.
- You can remove any configured plan by clicking **Delete**. Once you're finished adding plans to your quote, you can choose to view a PDF or send your quote via email.
- Your new quote will now appear under **Recent Quotes** on the left side of your secure Broker site.

View and Edit A Quote

- To view any saved quote, click on the name of the quote or click on **View All Saved Quotes** under **Recent**

Quotes, or use **Find A Quote** to search for a quote by name.

- Click the quote name to delete or change products for this quote.
- To view the final quote, click **View Quote**.

Email A Quote

- Click on the name of the quote or click **View All Saved Quotes** in the **Recent Quotes** list, or use **Find A Quote** to search for a quote by name, and then click **Email Quote**.
- Enter the email address and the message you wish to send with the quote.
- Click **Send Email** and your recipient will receive a PDF of the quote, along with the small group application and employee enrollment form.

Search for Quotes

- A list of your most **Recent Quotes** will always be shown on the left side of the secure **Broker** site.
- To view a saved quote, click on the quote name.
- To search for a specific quote, type the quote name into the **Find A Quote** and click **Search**.
- Click **View all Saved Quotes** to view a complete list of your saved quotes, then click the name of the group to access the quote overview.

Sales Brochures and Forms

- From your secure Broker home page, click the **Sales Brochures and Forms** tab for tools to help sell Delta Dental benefit plans and educate your clients and their employees about their dental benefits and the value of good oral health.
- Click the **Sales Brochures and Forms** tab to access forms to help manage your book of business such as enrollment, information change request and reports authorization forms.

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Edit Account Information

- From the secure Broker home page, click **Edit Account** at the top left of the screen for an overview of your existing account information.
- You can change your password from this screen.

Manage Your Book of Business

- From your secure Broker home page you can view a list of your clients sorted alphabetically by group name.
- You can also sort by **Next Renewal Date**, **Number of Lives** or **City** by clicking on the title of the column.
- Click on a group name to go to that group's detailed benefit report page.
- If you have Administrator access for a group, you can manage the group's eligibility by adding/terminating employees and managing existing employees' benefits.
- If you do not have access to manage a group's benefits, click **Apply to Administer Group** on the top left of your screen, complete the **Website Reports Authorization Form** and submit it to Delta Dental of Virginia.

Group Benefit Report Page

Coverage Info

- Select a client by clicking the **Group Name** from your client list. The **Coverage Info** tab will appear, showing details for the group.
- From the drop down box, select the group sublocation (GSD).
- Benefit details for that sublocation will now appear on your screen.
- Click the arrow next to any benefit category to get detailed coverage levels by procedure code and description.

Notes

- Click the **Notes** tab to keep an updated record of client communications and/or actions.
- Your notes will always be accessible when you view this group's benefits.

Bills

- From the **Group Benefit Report** page, click the **Bills** tab.
- To view details of any bills in PDF format, click on the **Group Number**.
- To view bills for a previous month, choose the month from the **Filter by Date** drop down menu.

Reports tab (administrator access required)

- Click the **Reports** tab for access to every report available to your group.
- To customize this tab to automatically show the reports you use most often ("Favorites"), click the **Add a New Report** button.
- Choose a report from the drop down box and click **Save**.
- Depending upon the report, you will be able to choose how you want the report grouped and whether to save it in PDF or Excel format.
- When you want to view any of your "Favorite" reports, click **Run** next to the report title. A screen with filters will appear. Choose the appropriate filters, then click **Run**.
- The report will appear in the file format you selected. You may save or print the report.
- Once a report is saved as a "Favorite", you can edit or remove the report by clicking **Edit** or **Remove** next to the report title.

Client Benefit Management (administrator access required)

- From the main **Group Benefit Report** page, click **Add A New Employee** on the left of the screen, then complete all requested fields to add an employee.
- Use **Find An Employee** to search for existing employees by name, subscriber ID or SSN.
- You can view the employee's ID card and handbook, as well as edit the employee's coverage.

No Login is Needed for the Remaining Sections

Get Appointed with Delta Dental

Make your clients smile by selling Delta Dental benefit plans.

Broker Resources

Access materials you need to sell new groups and manage existing ones.

Delta Dental Networks

Find information about Delta Dental's participating provider networks.

Oral Health and Wellness

Find out about adult oral health, children's oral health, and even oral cancer, and to access an oral health risk assessment tool that identifies oral health risks.

Product and Services

Delta Dental's small and large group product offerings and oral health information are always available. From **DeltaDentalVA.com**, click **Brokers** to access information about plans, small group product charts and brochures, as well as networks and oral health information.