



Broker Website Reference Guide

DeltaDentalVA.com helps you manage your book of business and create quotes easily with 24-hour access.

Creating an Account

- From **DeltaDentalVA.com**, click **Brokers**.
- Click **Create an Account**.
- Complete the fields for the required information and click **Create account**.
- If you have filled out all the fields correctly, the following message will appear:
Your account has been successfully created.

Forgot Password?

- From the broker page on our website, scroll down to **Log in** and then click **Forgot password**.
- You will be redirected to the login screen. Click “Forgot your password?”
- Enter your username and click **Reset my password**.
- You will receive an email with instructions on how to reset your password.

Forgot User Name?

To retrieve your user name, call 800.237.6060. You will be asked to verify the answer to your security question you chose when you set up your web access.

Logging In

- From **DeltaDentalVA.com**, click **Brokers**.
- Click **Log In**. You will be redirected to a login page.
- Enter your username and password and click **Sign In**.
- After logging in for the first time, you may change your password by clicking on the dropdown arrow next to your name and clicking **Edit Account**.
- From your secure Broker dashboard, you will see the number of renewals you have coming up in the next 90 days, your total number of active groups and groups you recently renewed.

Using the Quote Tool

Create a Quote

- Create new quotes from your broker dashboard or by clicking **Quotes**.
- To create a new quote, simply fill out the fields under **New Client Quote** and click **Build Client Quote**.

- Select plan options, coverage levels, waiting periods, deductibles and maximums. Then select whether you would like to see two-year rates and Delta Dental PPO™ — EPO Plan Design options. Click **Search Plans**.
- Rates for those plans will be displayed. To view coverage information, click **See Plan Details**.
- Click **Select Plan** next to any of the plans you wish to add to your rate quote.

Note: DeltaVision® plans are automatically included with all dental rate quotes. To add a DeltaVision plan to your rate quote, click **Select Plan**.

- To remove any plans from your quote, click **remove from quote** next to the plan you wish to remove.
- When you’ve finished adding plans to your quote, click **Save Quote**.

Search for Quotes

- Your most **Recent Quotes** will always be listed on your broker dashboard.
- To view a saved quote, click on the quote name.
- To search for a specific quote, click **Quotes**, then click **Quote History** and enter your search criteria.

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Broker Website Reference Guide (continued)

- Click on the quote name to view the quote.

View and Edit a Quote

- To view saved quotes, click the name of the quote under **Recent Quotes** on your broker dashboard, or search for a quote under **Quote History** on the **Quotes** tab.
- To add additional plans, click **Edit Quote** and follow the process above.
- Once finished adding plans, click **Download PDF** to save the quote for your client.
- Your new quote will appear under **Recent Quotes** on your broker dashboard and under **Quote History** on the **Quotes** tab.

Clone a Quote

Clone your most commonly-used quotes for different clients.

- To clone a quote, click the name of the quote under **Recent Quotes** on your broker dashboard, or search for a quote under **Quote History** on the **Quotes** tab. Click **Clone**.
- Change group information and plans and click **Save Quote** to save the new quote.

Email a Quote

- Click the name of the quote or click **View Saved Quotes** in the **Recent Quotes** list, or use **Find A Quote** to search for a quote by name. Download the quote as a PDF and send.

Managing your Delta Dental Book of Business

If you have administrator access* for a client, you can manage their benefits and eligibility under the **Clients** tab.

Coverage Info

- To manage your clients' coverage, click on the **Clients** tab.
- Scroll down to **Group Benefits** to view the group's coverage information and rates.
- Benefit details for that sublocation will appear.
- Filter by date or benefit plan to view coverage information for different benefit years and/or benefit plans.
- You can also enroll employees and dependents, terminate employees and dependents, and reinstate employees and dependents.

Bills

- From the **Clients** tab, click on the group name.
- Scroll down to **Group Benefits** and click **Bills**. A list of current bills will be displayed.
- To view bills for a previous month, click **Prior Bills**. Click **Download Bill** or **Rate Summary** for more information.

Reports*

- From the **Clients** tab, click the group name. Scroll down to **Group Benefits** and click **Reports**.
- Click the report you wish to run to expand the filter options.
- Filter the report, select the start and end date, and click **Generate Report**.
- Select to view the report in PDF or Excel format.

Client Benefit Management*

- From the **Clients** tab, click on the group name. Scroll down to **Group Benefits** and click **Employees**.
- Go to **Clients** tab and select the Group.

*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.



Broker Website Reference Guide (continued)

- Click on the **Employees** link.
- Search for **Active** or **Inactive** employees by name, member ID, or social security number.
- You can view the employee's ID card and handbook as well. Locate the employee and click ID Card or, to get the handbook, click the link for **Benefit Booklet**.

No Login is Needed for the Remaining Sections

Get Appointed with Delta Dental of Virginia

Make your clients smile by selling Delta Dental. Visit the Broker page at DeltaDentalVA.com to download forms and to complete the broker appointment process.

Broker Resources

Access materials to sell new groups and to help manage existing ones.

Delta Dental Networks

Find information about Delta Dental's participating dentist networks.

Sales Brochures and Forms

From the broker page of our website, click **Broker Resources** to access forms and tools to help sell Delta Dental plans, to educate your clients about their dental benefits and for information about the value of positive oral health.

Oral Health and Wellness

Access oral health resources for your clients, including oral health brochures and flyers.

Product and Services

Learn more about Delta Dental of Virginia products and services under the **Broker** section of DeltaDentalVA.com.