

Delta Dental of Virginia's Broker Website Quick Reference Guide



Secure Broker Site

The secure Broker website at deltadentalva.com helps you manage your existing book of business and create new and renewal quotes easily and efficiently with 24/7 access that accommodates your schedule. As you click through our site, certain sections will appear in pop-up windows or new tabs, depending on the browser you use. Please make sure you have any pop-up blockers turned off, or have customized your blockers to accept pop-ups from the Delta Dental of Virginia website. For the best viewing experience, we recommend you use the Mozilla Firefox browser.

Registration and Password

- From the deltadentalva.com home page, click the **Brokers arrow**.
- Click the **Register Here to Get Access** button, fill out all requested fields, then click **Create Account**.
- A confirmation screen will appear if your account has been created successfully. Click on the **Return to Broker Page** link to log in.

Log into the secure Broker website

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

What you can do once you log into your secure Broker site

Create A Quote

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

CONFIGURE A QUOTE

- Using the drop down boxes, 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 lists, and then clicking **Save and add to Rate Quote** under each plan.
- You can remove any configured plan by clicking **Delete**. Scroll to the top of the page to view a PDF version or send your quote via email.
- Your new quote will now appear under the **Recent Quotes** list 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 the **Recent Quotes** list, or use the **Find A Quote** box to search for a specific quote by name.
- Click the quote name to delete or change products for this quote.
- To view the final quote, click the **Export PDF** link in the Information section. Your quote will appear in a pop-up window or new tab as a PDF document.

EMAIL A QUOTE

- Click on the name of the quote or click on **View All Saved Quotes** in the **Recent Quotes** list, or use the **Find A Quote** box to search for a specific quote by name, and then click on the **Export Email** link.
- Enter the email information and any message you wish to send along with the quote; click the boxes next to any sales and enrollment materials you would like to include.
- Click **Send Email** and your recipient will receive a copy of the PDF quote via email.

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 link.

- To search for a specific quote, type the quote name into the **Find A Quote** box and click **Search**.
- Click the **View all Saved Quotes** link 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 Brokers home page, click the **Sales Brochures and Forms** tab for a selection of brochures and tools you can use to sell Delta Dental benefit plans and educate your clients and their employees about their dental benefits and the value of good oral health.

Edit Account information

- From the secure Brokers home page, click the **Edit Account** link 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 choose to 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 particular group, you will be able to manage the group's eligibility by adding/terminating employees and managing existing employees' benefits.
- If you do not currently have access to manage a group's benefits, click the **Apply to Administer Group** button 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

NOTES TAB

- Select a client by clicking the **Group Name** from your client list.
- The **Notes** tab will appear, where you can keep an updated record of client communications and/or actions.
- Your notes will always be accessible when you view this group's benefits.

COVERAGE INFO TAB

- Click the **Coverage Info** tab to view coverage 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.

BILLS TAB

- From the Group Benefit Report page, click the **Bills** tab.
- To view details of any bills listed 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 box.

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 (your "Favorites"), click the **Add a New Report** button.
- Choose a report from the drop down box and click the **Save** button.
- 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. Select the options you want and click **Save**.
- When you want to view any of your "Favorite" reports, click the **Run** button next to the report title. A screen with filters will appear. Choose the appropriate filters, then click **Run**.
- The report will appear in the available format or in the file format you selected. You may save the report to your computer or print it from the browser.
- Once a report is saved as a "Favorite", you can edit or remove the report by clicking on the **Edit** or **Remove** links next to the report title.

FORMS TAB

- Click the **Forms** tab to access forms to help manage your book of business such as enrollment, information change requests and authorization forms.

Client Benefit Management (Administrator access required)

- From the main Group Benefit Report page, click the **Add A New Employee** button on the left of the screen, then complete all requested fields to add an employee.
- Use the **Find An Employee** box 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.

Delta Dental General Benefits and Oral Health Information – available 24/7 to everyone. From the deltadentalva.com homepage click the Brokers link. From this page you can access information about Delta Dental plans and services, the Delta Dental networks and oral health and wellness.

Forgot Password?

- From the Brokers home page, click on the **Forgot password?** link under the Brokers login boxes. A screen will appear asking you for your user ID.
- Enter your user ID and click the **Verify Account** button.
- You will then be asked to provide the answer to your security question. Fill in 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 the Marketing Administration department at 888.335.8216.
- You will be asked to verify the keyword you chose when you set up your Web access.

Get Appointed with Delta Dental

- Find out how to make your clients smile by selling Delta Dental benefit plans.

FAQs

- Get answers to our most frequently asked Broker questions.

Broker Resources

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

Products & Services

- Learn about all the benefit plans and preventive features that Delta Dental has to offer.

Delta Dental Networks

- Find helpful information about Delta Dental's participating provider networks.

Oral Health and Wellness

- Find out more about adult oral health, children's oral health, and even oral cancer, including an oral health risk assessment that identifies oral health risks.