

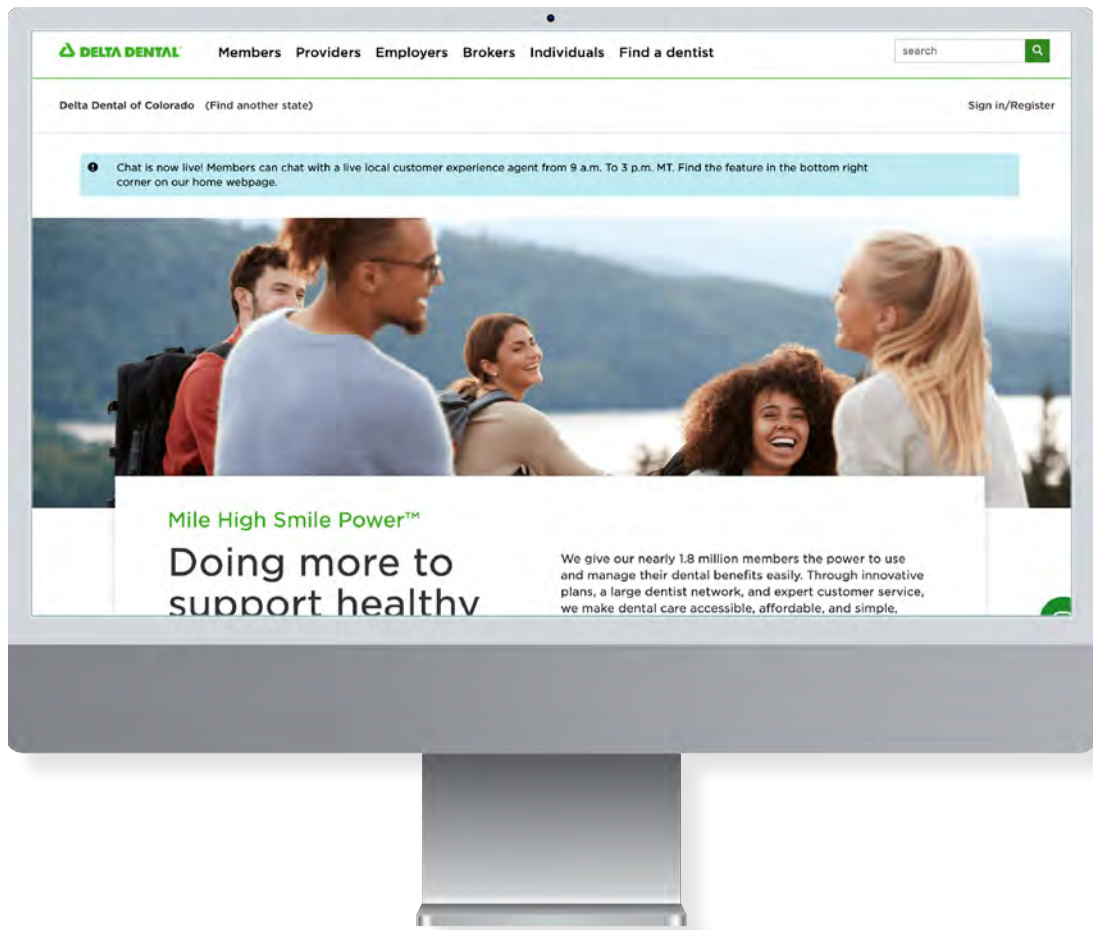


DELTA DENTAL OF COLORADO

Broker Resource Guide



Delta Dental does more...



To deliver effortless administration...Because we offer consistent and reliable support when your clients need it, Delta Dental helps them (and you) focus on other business needs. We also free up client time (and your time) by offering expert customer service support.

This guide will help you navigate our broker portal.



There are additional materials available in our resource library:
deltadentalco.com/resourcelibrary



Throughout this guide, you will see this icon to note where there is a supplemental video available.

Logging in to the Broker Portal

In May 2026, the new secure broker portal is launching. **For brokers who have been using the employer portal to manage tasks and groups, you will be able to use your existing username to log into the new broker portal. You will receive an email with instructions to update your password at transition.**

Requesting a new account

- Before requesting an account on the broker portal, brokers must be appointed with Delta Dental of Colorado. If you are not yet appointed, please contact DeltaDentalHub@ddpco.com.
- Brokers who did not previously have an account to use the employer portal will need to complete a [broker authorization form](#). Once the form is submitted, please allow 48 hours for your account to be created. You will receive an email from WebPortals@ddpco.com with your username and temporary password to your new account.

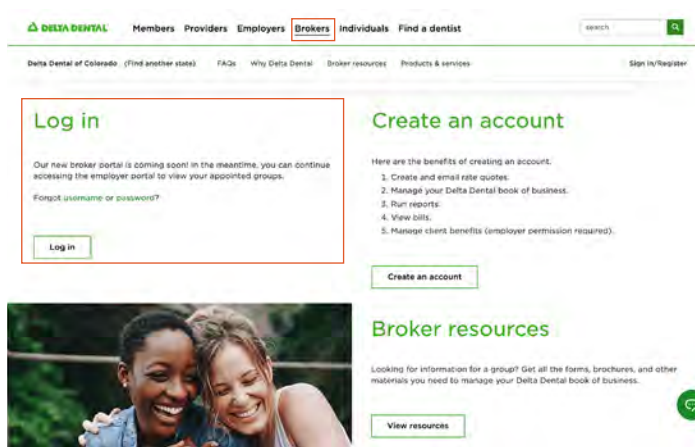
Logging On

There are two ways to log in:

1. Click on the **Sign in/Register** link on the top right-hand part of the page and select **Broker** from the I am a... drop-down menu, and click the green **Go** button. Enter your username and password and click **Log In**

OR

2. Click on the **Brokers** link at the top of the site and scroll down to Log In on the broker landing page, click **Log In**. Enter your username and password and then click **Sign In**



- If you forget your username or password, go to the Broker Log In page and click **Forgot Username or Password** to retrieve your information.

Reset Password

- To reset your password, look in the upper right-hand corner of the login page and click on the drop-down arrow next to your name.
- Select **Edit Account**.
- Enter your first and last name and email associated with your broker portal account and hit **Reset Password**.

The screenshot shows the Delta Dental web interface. At the top left is the Delta Dental logo. The navigation menu includes 'Dashboard', 'Clients', 'Forms', and 'Commissions'. On the top right, there is a 'Welcome Broker' dropdown menu. The main content area is titled 'Edit Account'. Underneath, there is a 'Personal Information' section with three input fields: 'FIRST NAME', 'LAST NAME', and 'EMAIL ADDRESS'. At the bottom of the form, there are two buttons: 'UPDATE' and 'RESET PASSWORD'.

Getting Started

Once you log in, you will be on the **Dashboard** where you can see the number of active groups in your account.



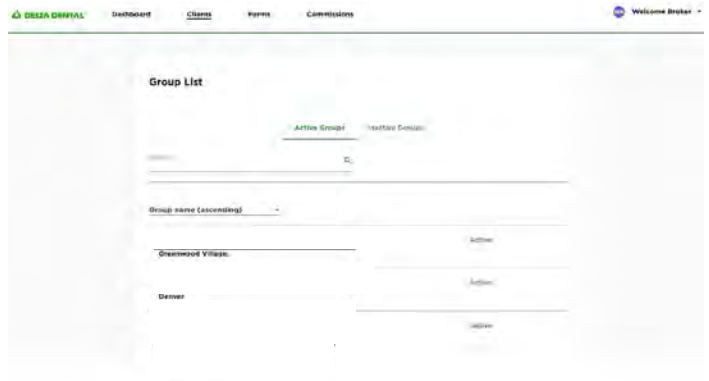
Tip: Click on the number of active groups and you'll be directed to the **Clients** tab.



From the **Clients** tab, you will see a Groups List with all your Active and Inactive Groups.

You can search your Groups by typing in a group name in the **Search** tab on top, or **Sort by** Group Name, Status, or Location.

Any groups you have administrative access for will be highlighted in green. If you only have reporting access, Bills will be grayed out.



From the **Forms** tab you will be able to view and download flyers, documents, past newsletters, and more. If there are groups that are not listed under your Clients list, you will need to have a Broker Portal Authorization Form completed by the plan sponsor. The form can be found [here](#).

If you click on the **Commissions** tab, you will be able to view your commission statements directly in the portal. Commissions are available in excel and PDF format. *Please note, if you use your Tax ID number for more than one instance for Delta Dental of Colorado you will not be able to view your commission statements through the portal. This is not a common occurrence, but if you are one of those individuals, please contact deltadentalhub@ddpco.com.



Video: [Downloading commission statements](#)

Administrative Access

With administrative access, you can view your group's coverage info, bills, reports, and employees.

If you only have reporting access, **Bills** and **Reports** will be grayed out.

If you work with small pool groups, **Reports** may not show.

The **Coverage Info** tab will provide you with high-level information about your group's subscription, including their current rates, maximum rule, and coverage levels.

You can also **filter by benefit plan** if the group has multiple plans.

The screenshot shows the 'Group Benefits' page with navigation tabs for Coverage Info, Bills, Reports, and Employees. The 'Coverage Info' tab is active. Below the tabs, there are filter options: 'FILTER BY AS OF DATE' set to 06/03/2021 and 'FILTER BY BENEFIT PLAN' set to ABC Industries. The main content area displays the SUBACCOUNT NUMBER as 0000000061-000000001 and the COVERAGE PERIOD as 01/01/2021 - current.

This screenshot provides a detailed view of the 'Group Benefits' page. The 'Coverage Info' tab is selected, and the 'ABC Industries' benefit plan is highlighted with a red circle. The page is divided into three main sections: Current Rates, Maximum Rule, and Coverage Levels.

BENEFIT PLAN	RATE DESCRIPTION	PREMIUM AMOUNT
ABC Industries	SUBSCRIBER	\$28.23
ABC Industries	SUBSCRIBER/SPOUSE	\$56.21
ABC Industries	SUBSCRIBER/CHILD	\$60.80
ABC Industries	SUBSCRIBER/CHILDREN	\$66.16
ABC Industries	FAMILY	\$95.66

BENEFIT CLASS	MAXIMUM TYPE	ALLOWED DPO / PREMIER / OON
INDV Prevention First Cal Yr	Individual	1000.00 / 1000.00 / --
Orthodontic Services	Individual	0.00 / 0.00 / 0.00
INDV OON All Covered Classes Cal Yr	Individual	-- / -- / 1000.00

DESCRIPTION	WE PAY DPO / PREMIER / OON	DEDUCTIBLE WAIVED DPO / PREMIER / OON	WAITING PERIOD DPO / PREMIER / OON
Basic Services (RS4K PPO and Premier Only)	80% / 80% / 80%	No / No / No	N/A / N/A / N/A
D&P Services (RS4K PPO and Premier Only)	100% / 100% / 100%	No / No / No	N/A / N/A / N/A
Major Services (RS4K PPO and Premier Only)	50% / 50% / 50%	No / No / No	N/A / N/A / N/A

Reporting

The **Reports** tab under Clients gives you the ability to request reports for groups which you have reporting access. If you work with small pool groups, **Reports** may not show.

You will be able to sort reports by specific time periods, employment status, top account, sub-sub-accounts, and more.

Once you fill out the required fields, the report will generate and a message will pop up indicating it has run.

Once you fill out the required fields, the report will generate and a message will pop up indicating it has run. In most cases, reports will be emailed to the email that is associated with the portal account. The email should be received almost instantaneously.

Coverage Info Bills **Reports** Employees

All reports will be processed offline. You will receive an email with the attached report when it is ready.

Benefits Utilized By Member
The Benefits Utilized by Members report summarizes the number and percentage of members receiving their cleaning (prophylaxis) for the current and prior reporting period. This report also shows the number and percentage of members utilizing the dental plan with any dental procedure in the given report timeframe.

Claim Summary
The Claims Summary report provides detailed information on claims submitted (e.g. number of claims paid, average enrollment, average cost per employee/member) for the current and prior reporting period.

Claims Incurred and Claims Paid
The Claims Incurred and Claims Paid report (aka Claims Lag report) shows the delay between when a claim is incurred (date of service) and when the claim is paid for a 24-month reporting period.

START DATE: 06-03-2020 END DATE: 06-03-2021

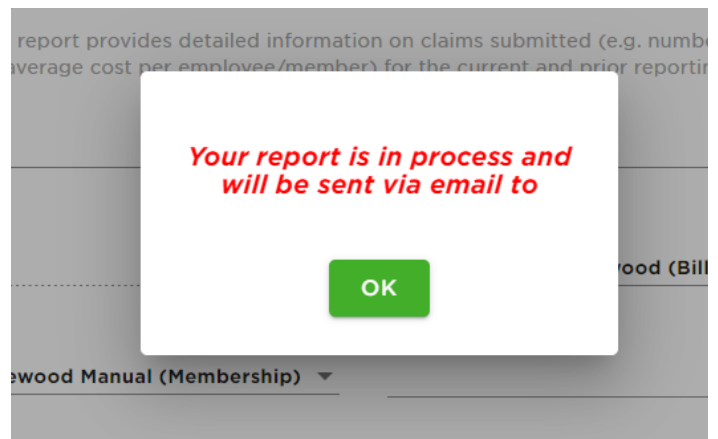
TOP ACCOUNT: ABC INDUSTRIE SUB ACCOUNT

SUB SUB ACCOUNT DEPARTMENT

EMPLOYMENT STATUS EMPLOYMENT TYPE

UNION STATUS BENEFIT PLAN

GENERATE REPORT



The email with the report attachment will come from No_Reply@ddpco.com with the subject: Delta Dental Report Generation: (Group Name) – (Report Name)

From: "No_Reply@ddpco.com" <No_Reply@ddpco.com>
Date: Tuesday, April 6, 2021 at 10:06 AM
To:
Subject: ENC: ENC: Delta Dental Report Generation: ABC Industries - Enrollment By Member Type
Enrollment By Member Type

The first page is a summary, and the second (tab in Excel) contains the detail.

ABC Industries (Billing)

Enrollment By Member Type
Period: 04/06/2020 to 04/06/2021
Product Line: Dental

Month	Members	Subscribers	Spouses	Dependents
February 2021	8	5	0	0
March 2021	11	11	0	0
April 2021	12	12	0	0
Total	31	28	0	0
Reverse	0	0	0	0



Tip: Like the billing details, you can sort data in the Excel version of the reports to see different snapshots of your group.



Billing


The **Bills** tab providing eligibility and billing access to their clients. If you'd like access, please contact deltadentalhub@ddpco.com.

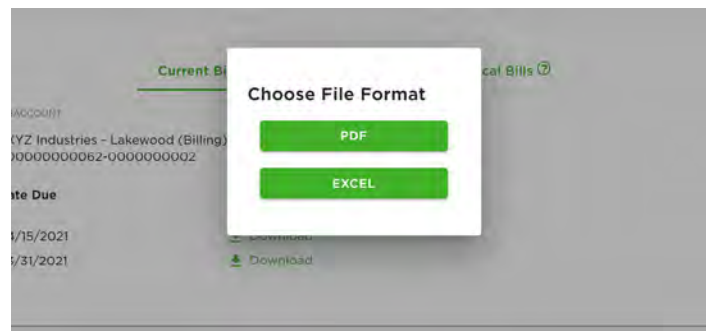
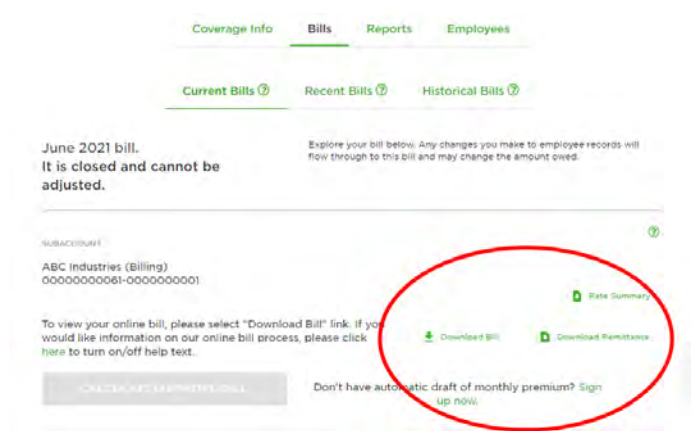
You are able to view the groups' bills and approve them as they become available. You can also view **recent bills** and **historical bills**.

You can **Download the current bill** in PDF or EXCEL format. You can also download a **rate summary** or **remittance report**.

You can also conveniently **sign up** your group for automatic draft for their monthly premium.

Depending on your portal access, you may also be able to make changes to employee records and these changes will be reflected on your group's bill in real time.

 **Tip:** You can only adjust or approve the bill during the billing review period. Once the bill review period closes, you can no longer make changes or approve, therefore the **Calculate/Approve** button is no longer available.



With both versions, you will first see the bill summary and remittance, followed by the bill detail and rate summary.



Tip: Within the Excel file, use the tabs to see additional detail.



Delta Dental of Colorado
PO Box 912148
Denver, CO 80291-2148

Eligibility as of: 04/21/2021
Bill Number: 80370
Group Number: 0000000061-000000001
Coverage Period: 05/01/2021-06/01/2021
Due Date: 05/01/2021

ABC Industries (Billing)
Sara Smith
123 Main St

Denver, CO 80229

Billing Summary	
Balance Forward	\$655.75
Current Charges	\$395.22
Total Amount Due	\$1,050.97

If your payment is not received, in full within 31 days from the due date, coverage may terminate. Eligibility changes submitted with payment will not be accepted. You can update eligibility and sign up for automatic draft of monthly premium by logging in at DeltaDentalCO.com.

Thank you for your business.

If paying by check, detach and return this portion with your payment.



Eligibility as of: 04/21/2021
Bill Number: 80370
Group Number: 0000000061-000000001
Coverage Period: 05/01/2021-06/01/2021
Due Date: 05/01/2021

Include the group number on your check and make payable to:

Delta Dental of Colorado
PO Box 912148
Denver, CO 80291-2148

Total Due:	Amount Enclosed:
\$1,050.97	

0000000061-000000001-7

One advantage of the Excel version is it allows you to sort and filter data about your client's membership.

	A	B	C	D	E	F	G	H	I	J	K
1	Subscriber Id	Last Name	First Name	Department	Status	Type	Union	Benefit Plan Name	Rate Code	Billing Mo	Total Premium
2	159-83-6554	Anderson	Jason	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
3	159-83-6554	Anderson	Jason	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
4	159-83-2596	Anderson	Lori	Fields	Active	Full-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
5	159-83-2596	Anderson	Lori	Fields	Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
6	159-83-2596	Anderson	Lori	Fields	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
7	392-95-8088	Bodart	Carissa	Sales	Active	Full-Time	N	ABC Industries	SUBSCRIBI01-01-202		\$28.23
8	123-45-6789	Brown	James	Sales	Active	Part-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
9	123-45-6789	Brown	James	Sales	Active	Part-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
10	123-45-6789	Brown	James	Sales	Active	Part-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
11	852-35-8951	Johnson	Haley	Sales	Active	Full-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
12	852-35-8951	Johnson	Haley	Sales	Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
13	852-35-8951	Johnson	Haley	Sales	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
14	259-66-2511	Johnson	Lucas	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
15	259-66-2511	Johnson	Lucas	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
16	123-45-6789	Jones	Bob		Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
17	123-45-6789	Jones	Bob		Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
18	123-45-6789	Jones	Joe		COBRA	Full-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
19	123-45-6789	Jones	Joe		COBRA	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
20	123-45-6789	Jones	Joe		COBRA	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
21	123-45-6789	Martinez	Maria	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
22	123-45-6789	Nelson	Chris		Continuation	Part-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
23	123-45-6789	Nelson	Chris		Continuation	Part-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
24	123-45-6789	Sheppard	Derek		Disability/LTD	Part-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
25	123-45-6789	Sheppard	Derek		Disability/LTD	Part-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23

Manage Members

Begin by clicking on **Employees** tab.

- Search for any employee by typing their name in the Employee Name Field and hit Enter. You can also search by their Member ID or SSN.
- If they have a future effective date or have been terminated, click there to see that list.



Tip: You can enter both first and last name or just one or the other.

EMPLOYEE NAME	EFFECTIVE DATE	MEMBER ID	MEMBER SSN
Anderson, Jason	03/01/2021	0800000000102-01	XXX-XX-6554
Anderson, Lori	02/01/2021	08000000000846-01	XXX-XX-2596
Billings, Jason	01/01/2021	08000000001382-01	XXX-XX-1355
Brown, James	02/01/2021	08000000000693-01	XXX-XX-6789
Jones, Bob	03/10/2021	08000000000785-01	XXX-XX-6789

Make edits to a member's subscription by clicking on the pencil icon next to their name.

You can edit the employee's personal information, employee's effective date, add dependents, or change the plan they're enrolled into.

You can also manage an employee's coverage by clicking on **Manage Coverage**. This will allow you to change their effective date or **terminate their dental coverage**.

From this screen, you can also submit a request for an **Employee Report**. This report will be sent to the email associated with the portal login.

The **Claims** tab provides information on the employee's claims.

- If **Claims** is greyed out, you will need client approval to access that tab. Contact deltadentalhub@ddpco.com to set it up.

Back to Employee List Employee Report

Manage Member Manage Coverage Claims

Noah Oliver ✎

Status: Active

COVERAGE AS OF (Select Date): 06/03/2021 📅

^ Dental TERMINATE DENTAL COVERAGE

COVERAGE PERIOD	RATE TIER
01-01-2021 - 01-01-3000	SUBSCRIBER/CHILDREN
DENTAL PLAN	EFFECTIVE ON
ABC Industries	01/01/2021

Enrolled Members

Name	Relationship	
Noah Oliver	Self	
Ben Oliver	Child	TERMINATE
James Oliver	Child	TERMINATE
Mason Oliver	Child	TERMINATE



Video: [Add an employee](#)

Add an Employee

First navigate to the **Clients tab**. Then click on the **Active Groups tab**, select the applicable group name.

If you do not see the group's name, enter criteria into the search box and press Enter to filter your list.

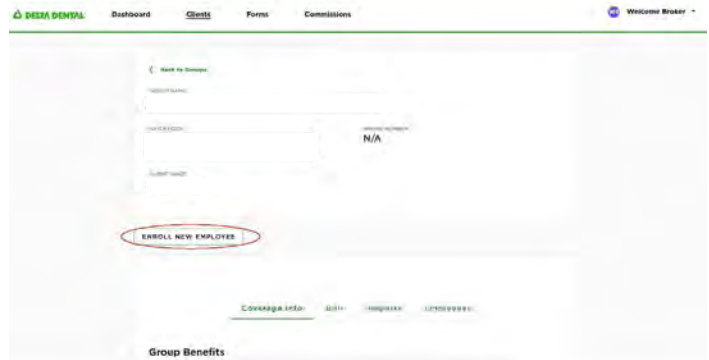
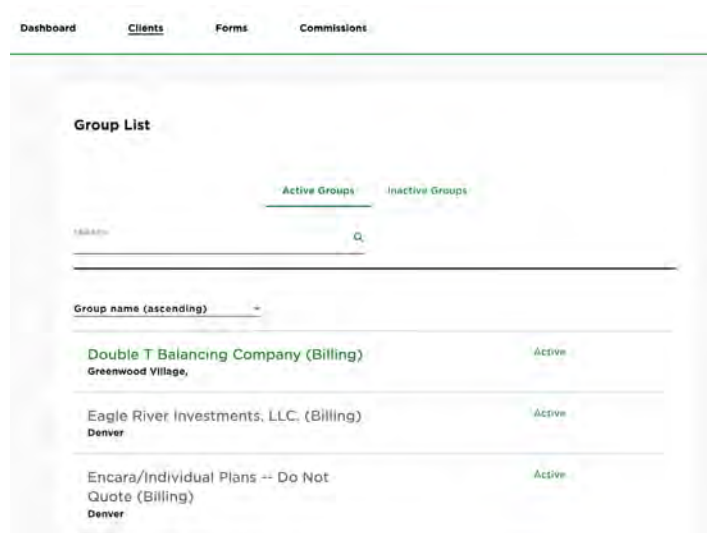
Once the group name has been located, click on the name to bring you to the group page, you will see an Enroll New Employee in a green outlined box below the top section. Fill out all the required fields for the employee (and dependents if applicable) then hit submit.



Tip: If you're not sure whether you have already added an employee with a future effective date, simply search for the employee by effective date.



Video: [Update an employee](#)



Terminate an Employee

Click the red **Terminate** button next to the employee's name.

A confirmation window will appear. Enter the termination date and click **Yes** to confirm termination of the employee.



Tip: Coverage will end on the termination date you enter. For example, if you want the employee to be covered through September, the termination date entered should be October 1. Terminating an employee will automatically terminate any dependent coverage as well.

Are you sure you want to terminate the Self **James Brown**?

TERMINATION DATE *
10/01/2021

Reminder: Coverage will end on the date you entered. For example, if you want coverage through and including 12/31/2019, then the Termination Date should be 01/01/2020.

YES **NO**

To reinstate an employee, from the employee record, click **Manage Coverage** and then **Reinstate Dental**.

Manage Member | **Manage Coverage** | Claims

Maria Martinez

Status: Inactive

COVERAGE AS OF (Select Date): 04/20/2021

Dental **REINSTATE DENTAL**

COVERAGE PERIOD: 05-01-2021 - 01-01-3000

RATE TIER: SUBSCRIBER

DENTAL PLAN: XYZ Industries High Plan

EFFECTIVE ON: 05/01/2021

Frequently Asked Questions

Some brokers share a login with the rest of the agency. How will this shared login affect reporting?

We understand that many broker agencies have access accounts set up as a universal login for all of their brokers rather than an individual account for each agent. If this is the case for you and you'd like an individual account set up, please contact your sales executive.

Reports are received via email in near real-time to the email address with which you logged in to the portal.

- The requested reports typically only take a few minutes to arrive in the inbox.
- The email comes from No_Reply@ddpco.com.
- The subject of the email contains the group name and report type. The body of the email contains the report name.

Will brokers be able to access commission statements online?

Brokers will have access to viewing commission statements on the broker portal with the option to download via PDF or Excel.

Will I have access to client information?

If you have administrative access, you can view your group's coverage info, bills, reports, and employees. If you do not currently have access to these features, please contact DeltaDentalHub@ddpco.com.

Will we have access to renewal information/letters?

The broker portal is being launched in phases. Our next phase includes the inclusion of renewal information on the portal. We will be providing more information on that when the time is appropriate.