DELTA DENTAL OF KANSAS

TECHNOLOGY UPGRADE

Learn more at
DeltaDentalKS.com/Upgrade

ONLINE BROKER ACCOUNT USER GUIDE

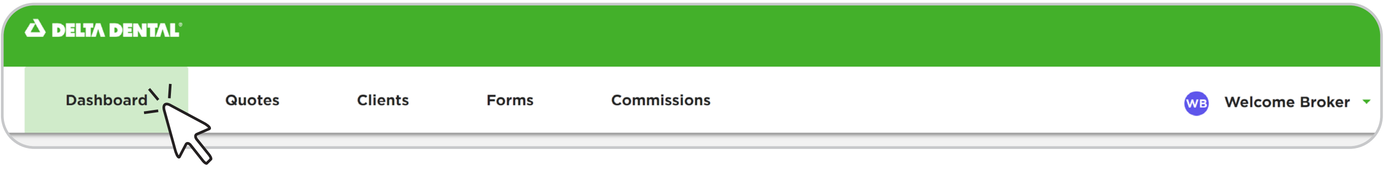
Table of Contents

Click on a topic to go to that page:

Dashboard Overview
Online Broker Account User Guide

Navigating the Dashboard

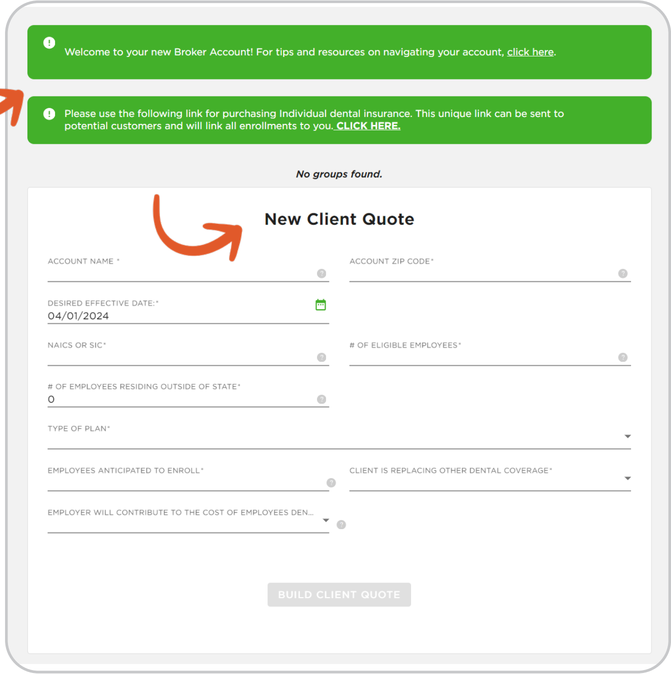
1. Our new layout provides easier navigation throughout your new online Broker Account. Right from the navigation bar you are able to start a small group quote, view active group information, access forms, and more!



2. Quickly access **tips and resources** on how to navigate your broker account.

3. If you sell individual dental insurance, you can access your **unique broker link**.

4. Easily start a new small group quote under **New Client Quote** right from the Dashboard.



Dashboard Overview Watch Video

Watch this video to learn how to navigate the new online Broker Account **Dashboard**.

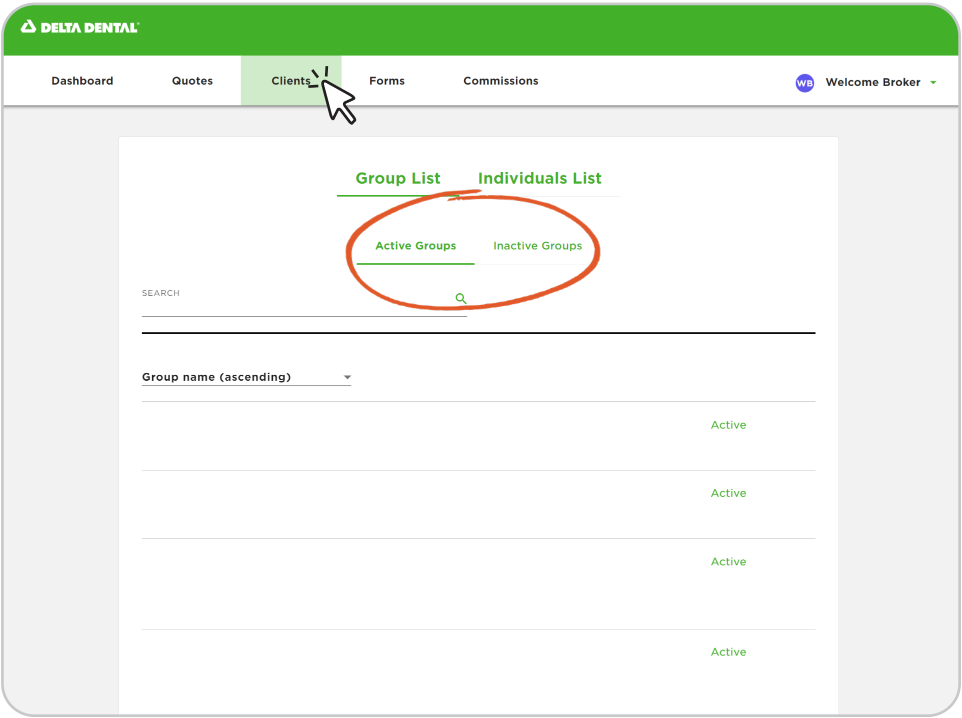
Looking up a Client

Online Broker Account User Guide

DELTA DENTAL®

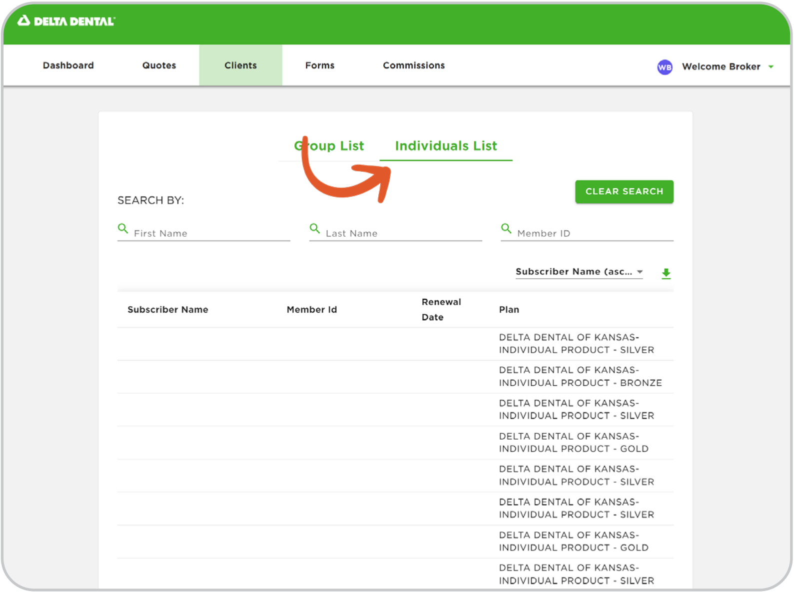
How to Look Up a Client

1. In the **Clients tab**, you will be able to view your **active and inactive groups** under **Groups List**.



2. Under Individuals List, you can search for a member by **First Name, Last Name, or Member ID**.

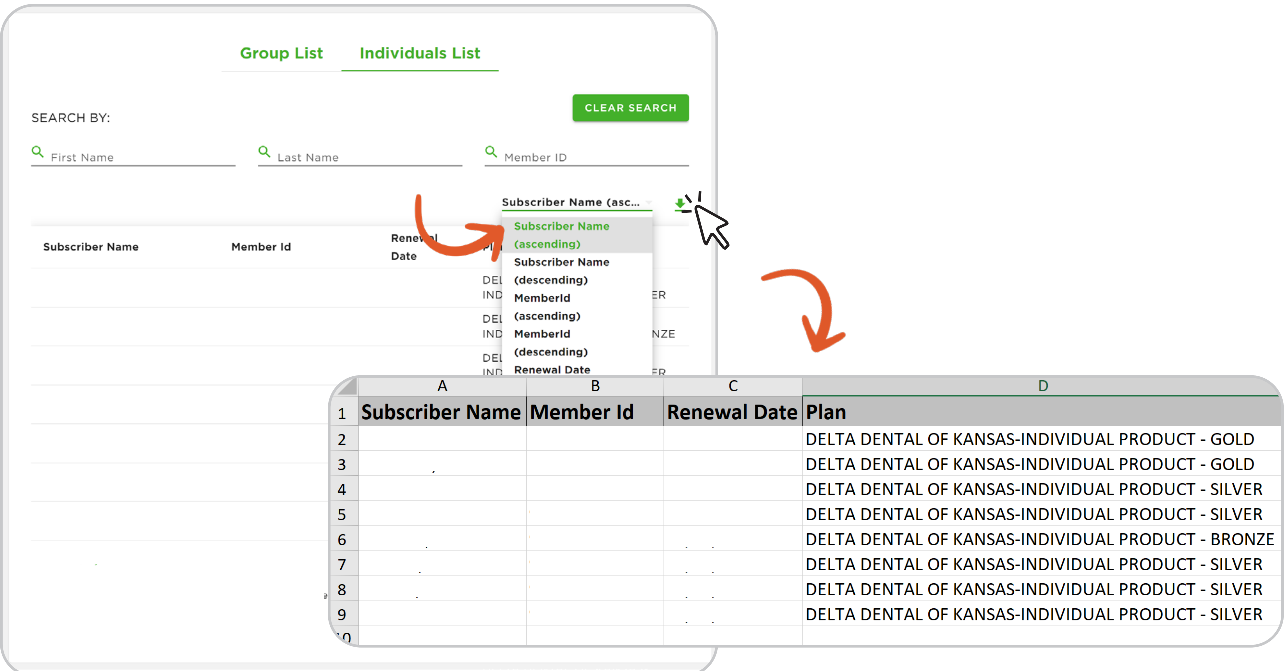
   You do not need to fill out all of the fields to search.



Looking up a Client
Online Broker Account User Guide

How to Look Up a Client

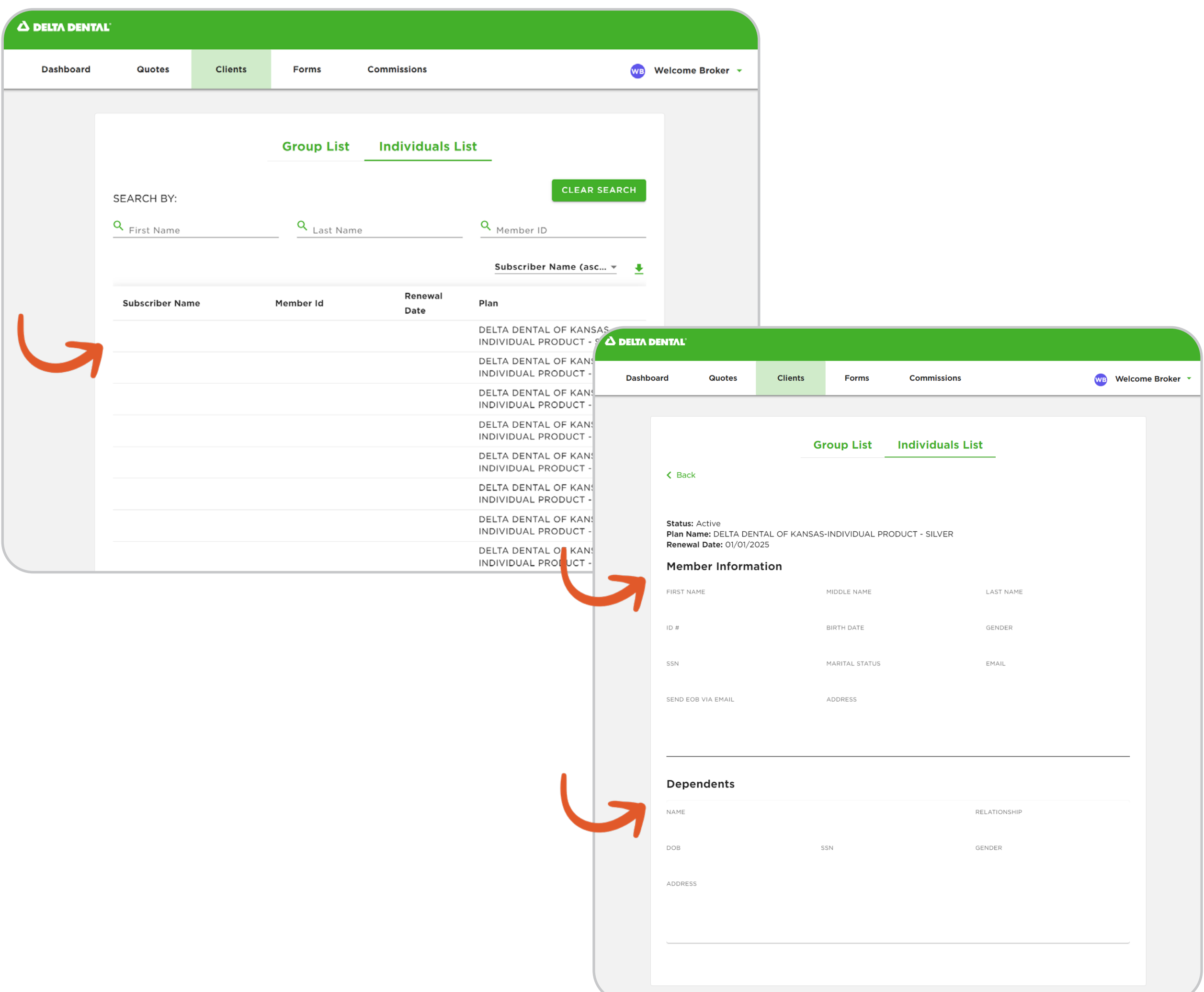
3 You can filter by **Subscriber Name and Member ID**. You can also download an excel sheet to export individual subscribers.



Looking up a Client
Online Broker Account User Guide

How to Look Up a Client

4. Once you click the members name in green text, you will be able to view the members information. If the member has a dependent, you will also see the information for their dependents.



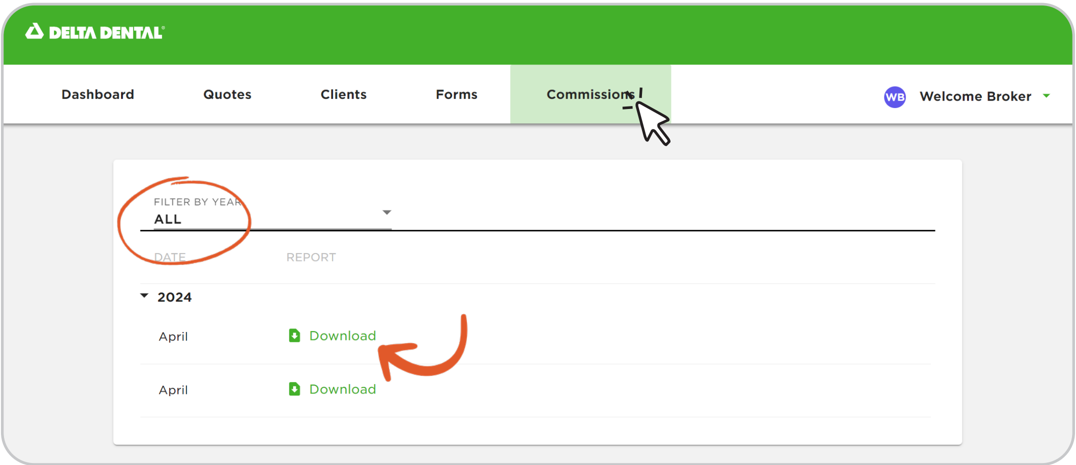
Looking up a Client Watch Video

Watch this video to view how to look up one of your clients on the new online Broker Account.

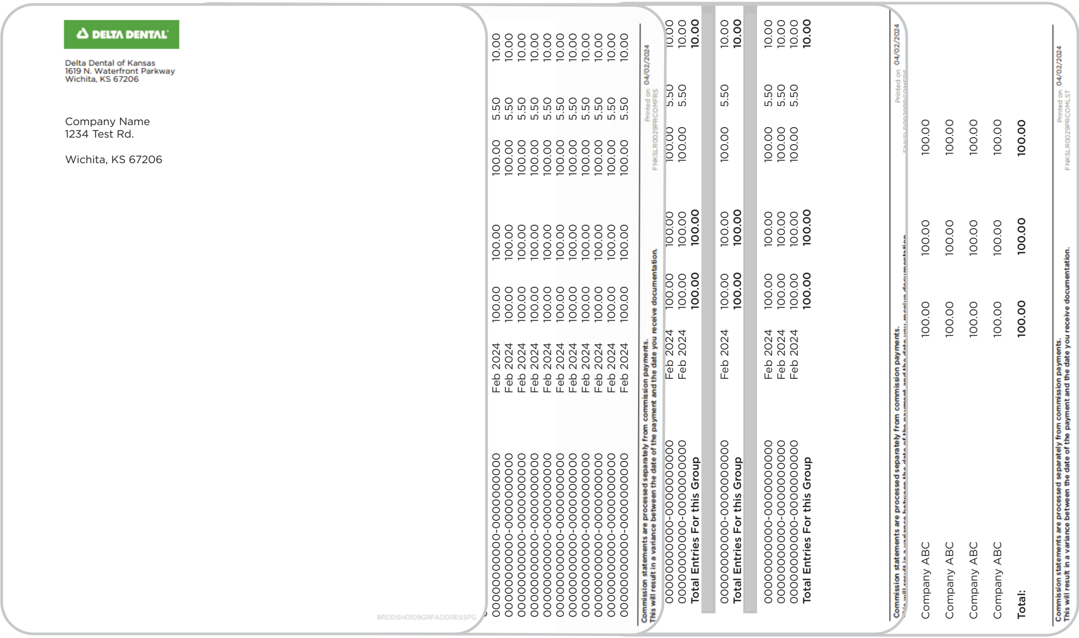
Review Commissions
Online Broker Account User Guide

How to Review Commission Statements

1. In the **Commissions tab**, you are able to filter by all reports or by year. Click **Download** to find the reports you want to view.



2. The Producer Commission Statement will be downloaded as a PDF.



Review Commissions
Online Broker Account User Guide

How to Review Commission Statements

3 Within the Producer Commission Statement, you can view the **account number, subscriber name, billing month, invoice amount, premium received, and more!**

DELTA DENTAL

Producer Commission Statement

Delta Dental of Kansas
1619 N. Waterfront Parkway Wichita, KS 67206
Phone 1-800-234-3375

Broker Tax ID: 00-0000000

Company Name
1234 Test Rd.

Wichita, KS 67206

Account Name Account Number	Subscriber Name	Billing Month	Invoice Amount	Premium Received	Commission Basis	Rate	Commission Amount
Company ABC							
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00
0000000000-0000000000		Feb 2024	100.00	100.00	100.00	5.50	10.00

Commission statements are processed separately from commission payments.
This will result in a variance between the date of the payment and the date you receive documentation.

Printed on 04/02/2024
FNKSLR0029PRCOMFRS

4 At the end of the report, you can view the Producer Commission Summary that will list the **invoice amount, premium received, and current commission.**

DELTA DENTAL

Producer Commission Statement

Delta Dental of Kansas
1619 N. Waterfront Parkway Wichita, KS 67206
Phone 1-800-234-3375

Broker Tax ID: 00-0000000

Company Name
1234 Test Rd.

Wichita, KS 67206

Producer Commission Summary	Invoice Amount	Premium Received	Current Commission
Company ABC	100.00	100.00	100.00
Company ABC	100.00	100.00	100.00
Company ABC	100.00	100.00	100.00
Company ABC	100.00	100.00	100.00
Company ABC	100.00	100.00	100.00
Company ABC	100.00	100.00	100.00
Company ABC	100.00	100.00	100.00
Company ABC	100.00	100.00	100.00
Company ABC	100.00	100.00	100.00
Total:	**100.00**	**100.00**	**100.00**

Commission statements are processed separately from commission payments.
This will result in a variance between the date of the payment and the date you receive documentation.

Printed on 04/02/2024
FNKSLR0029PRCOMLST

Review Commissions Watch Video

Watch this video to view how to review your Producer Commission Statements on the new online Broker Account.

ONLINE QUOTING

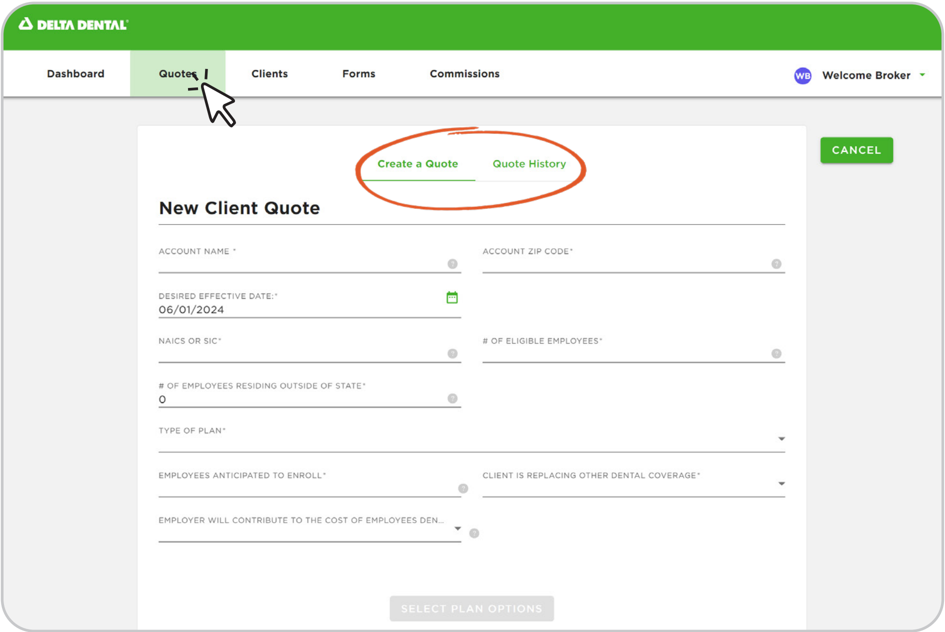
Online Broker Account User Guide

Learn more on how to generate, edit and clone a quote.

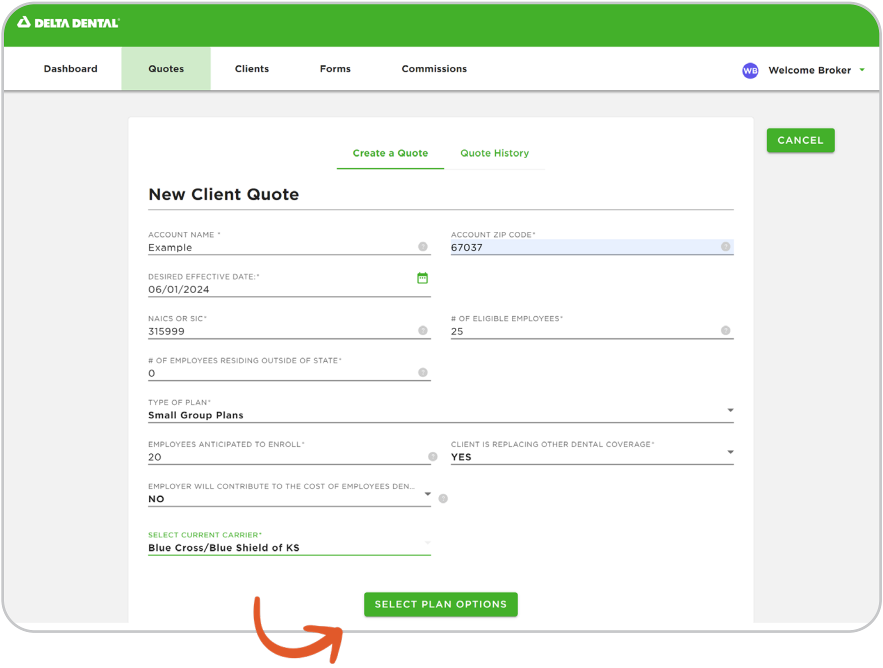
Generating a Quote
Online Broker Account User Guide

How to Generate a Quote

1. In the **Quotes tab**, you will be able to create a quote or view your quote history.



2. To start a quote, fill out the necessary fields and click **Select Plan Options**.

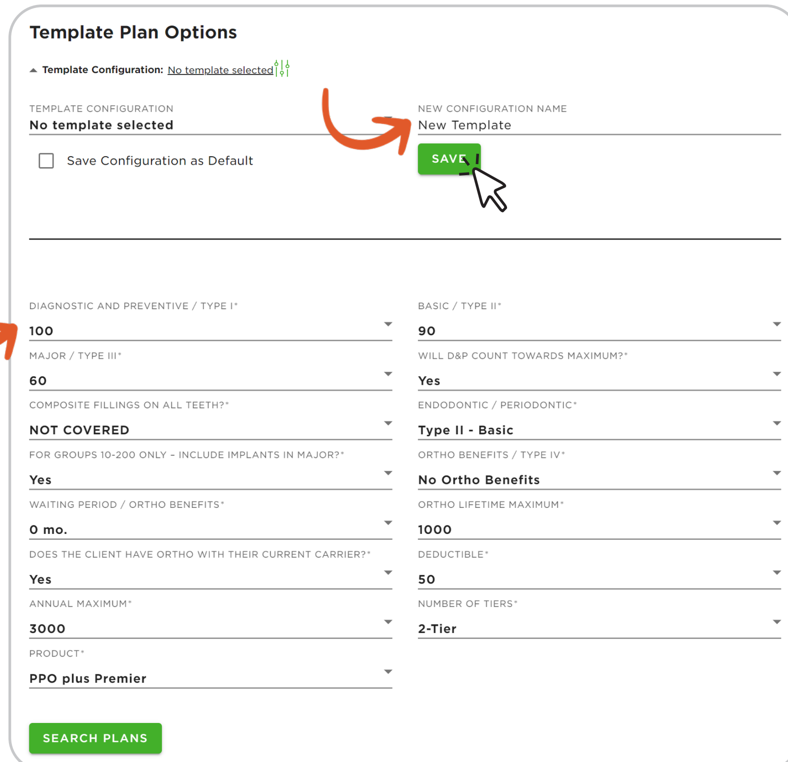


Generating a Quote
Online Broker Account User Guide

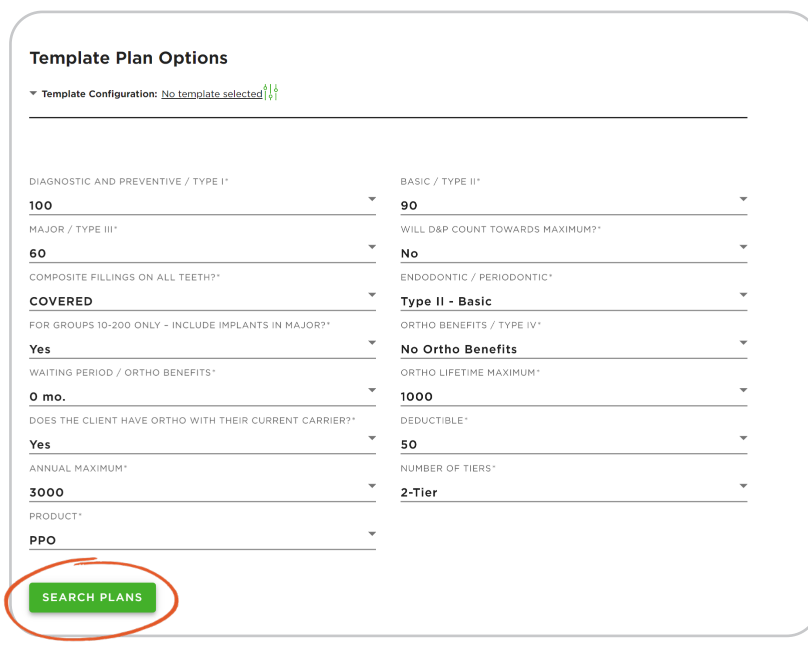
How to Generate a Quote

5 To create a new template plan option for future use, fill out all the necessary information for the plan and create a new configuration name for the template.

Click **Save**. You will be able to use this template for future quotes.



6 Once you have filled out a template or filled out the information for the plan, click **Search Plans**.

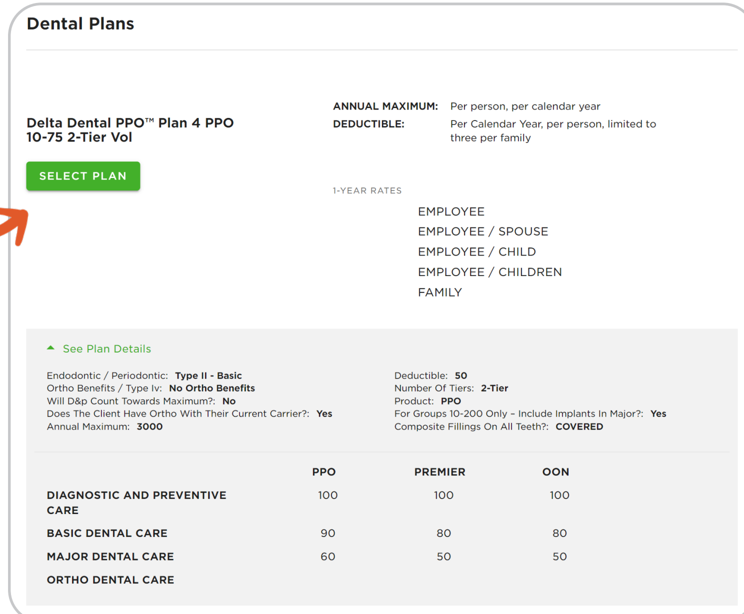


Generating a Quote

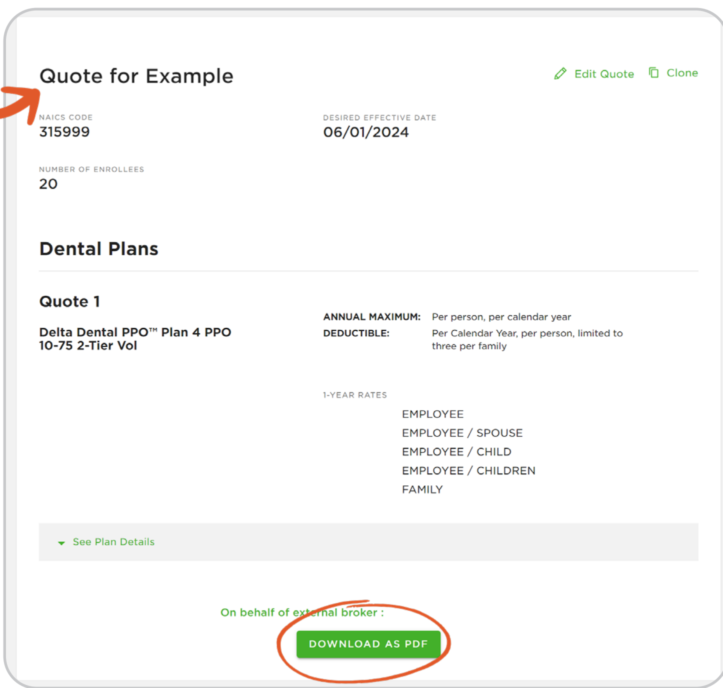
Online Broker Account User Guide

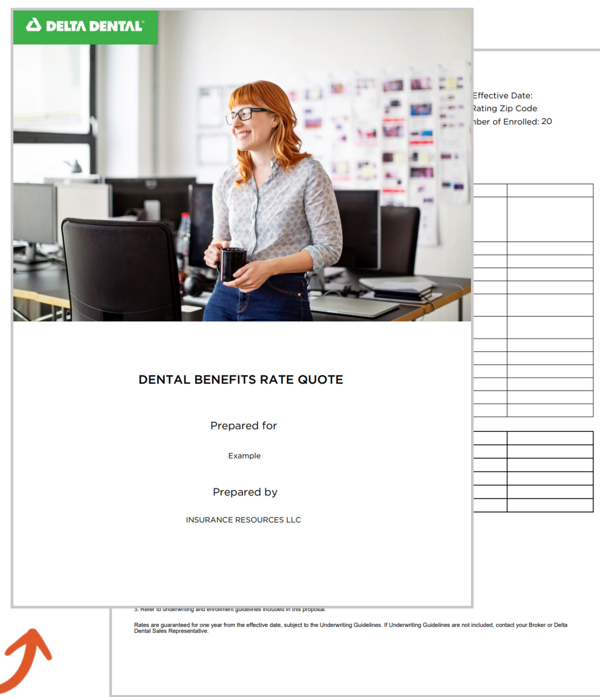
How to Generate a Quote

7 Plan Options will populate based on the fields entered. When you find a plan you want to quote, click **Select Plan**.



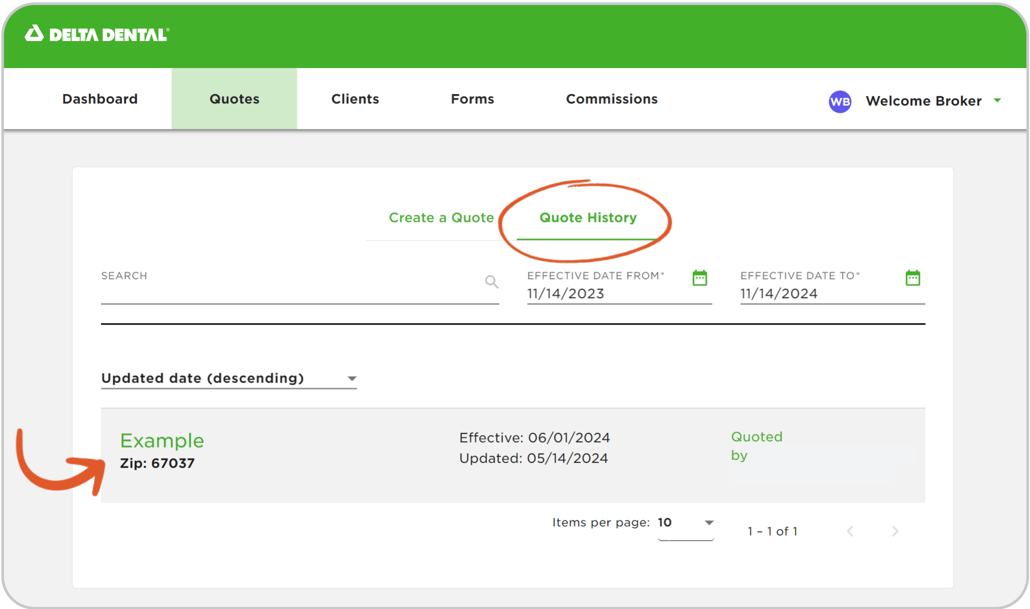
8 The quote for the plan will appear where you can view plan details and rates. Click **Download** to view the quote in a PDF.





How to Generate a Quote

9 After creating the quote, you will be able to find and review the quote in the **Quotes tab** under **Quote History**.



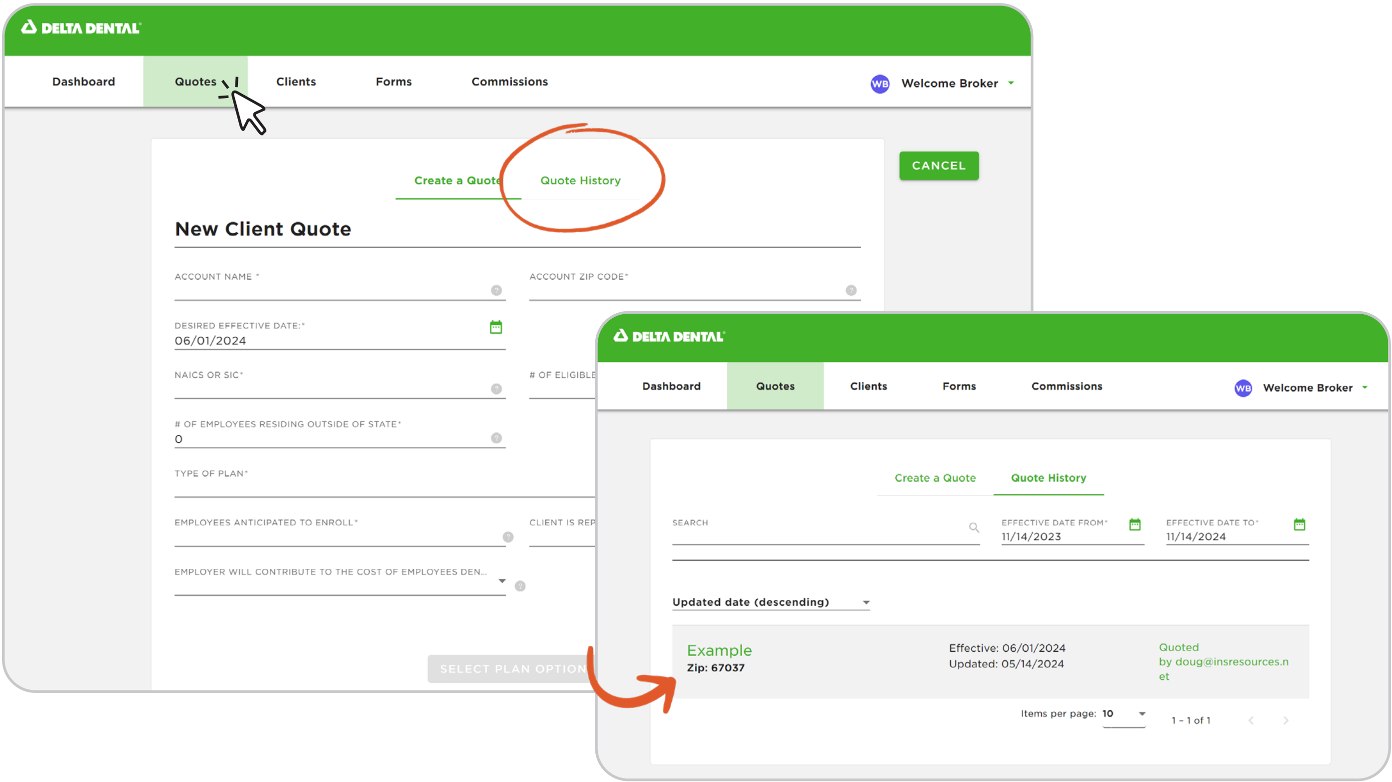
Generating a Quote Watch Video

Watch this video to view how to generate a quote on the new online Broker Account.

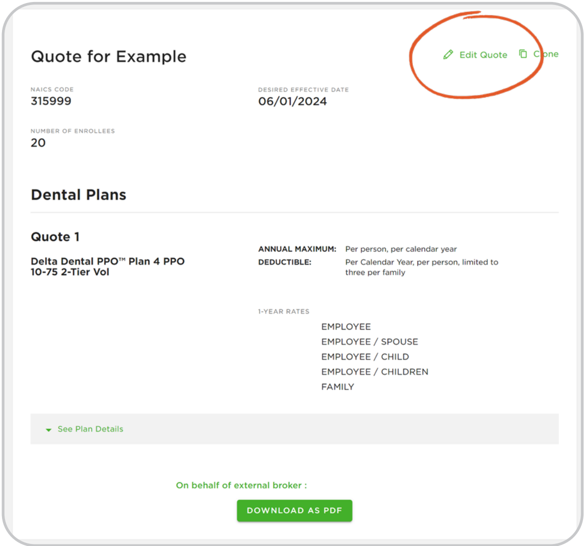
Edit or Clone a Quote
Online Broker Account User Guide

How to Edit or Clone a Quote

1. In the **Quotes tab**, click **Quote History**. Click on the quote you would like to edit or clone.



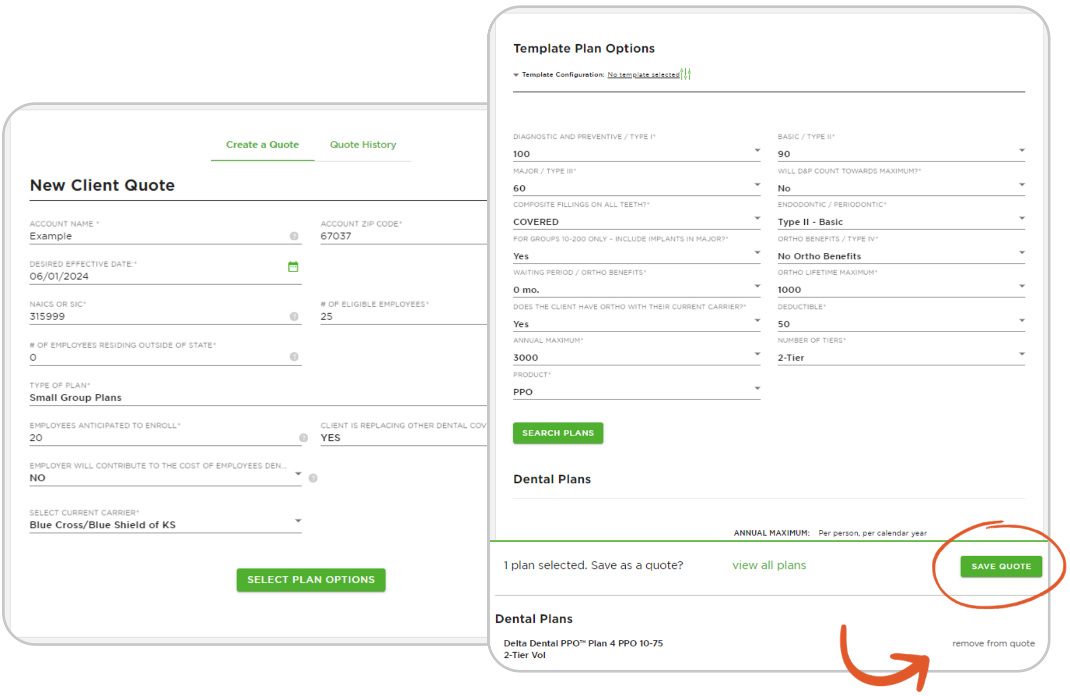
2. To edit the quote, click **Edit Quote**.



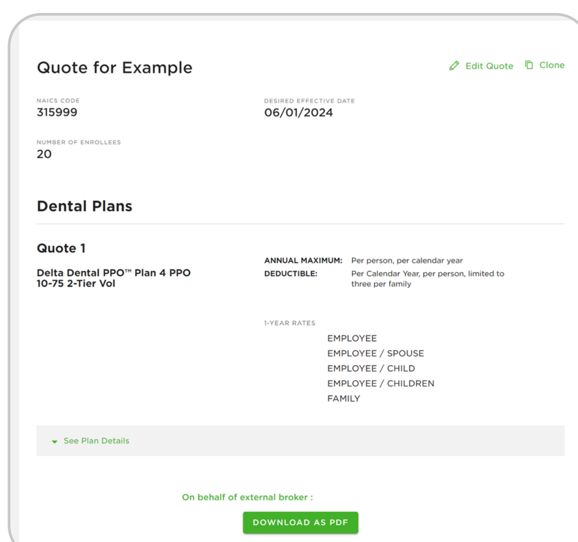
Edit or Clone a Quote
Online Broker Account User Guide

How to Edit or Clone a Quote

3 You will be able to edit your quote or search for a new plan option. You can also remove plans from the quote by clicking **Remove From Quote** at the bottom of the screen. Once you make your edits, click **Save Quote**. You can view your new quote with any changes saved.



4 You can view your new quote with any changes saved.

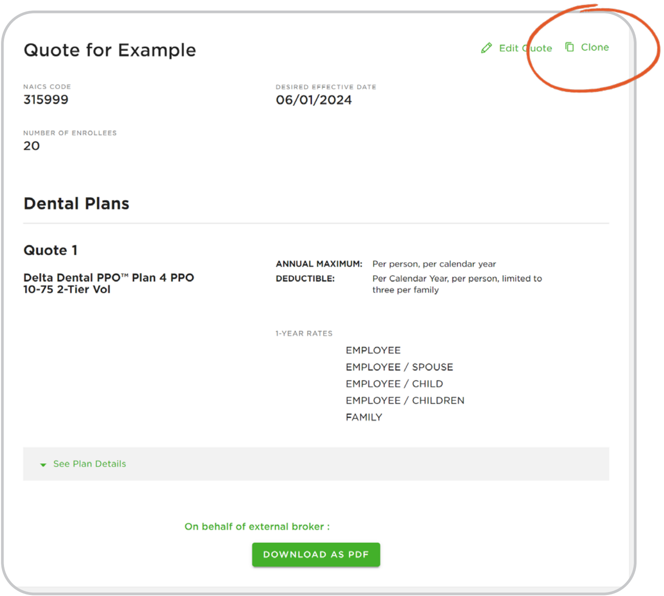


Edit or Clone a Quote

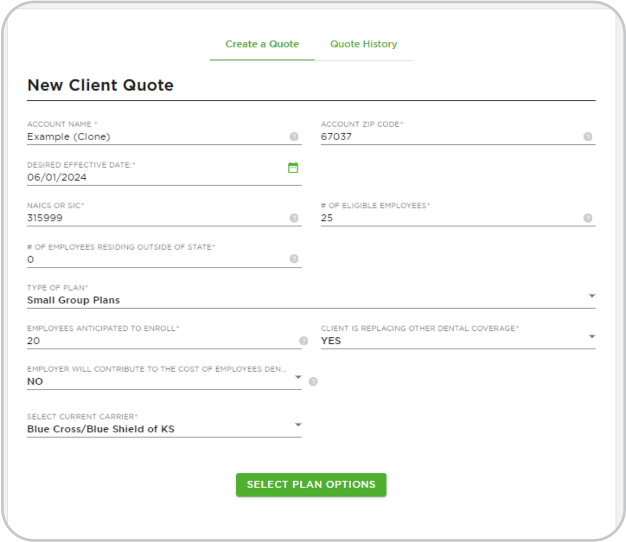
Online Broker Account User Guide

How to Edit or Clone a Quote

5 To clone a quote, click **Clone**.



6 A clone of the quote will be made and you can edit any part to apply to the new quote. Once you make all the necessary adjustments, click **Save Quote**. You will see your new quote to view and download as a PDF.

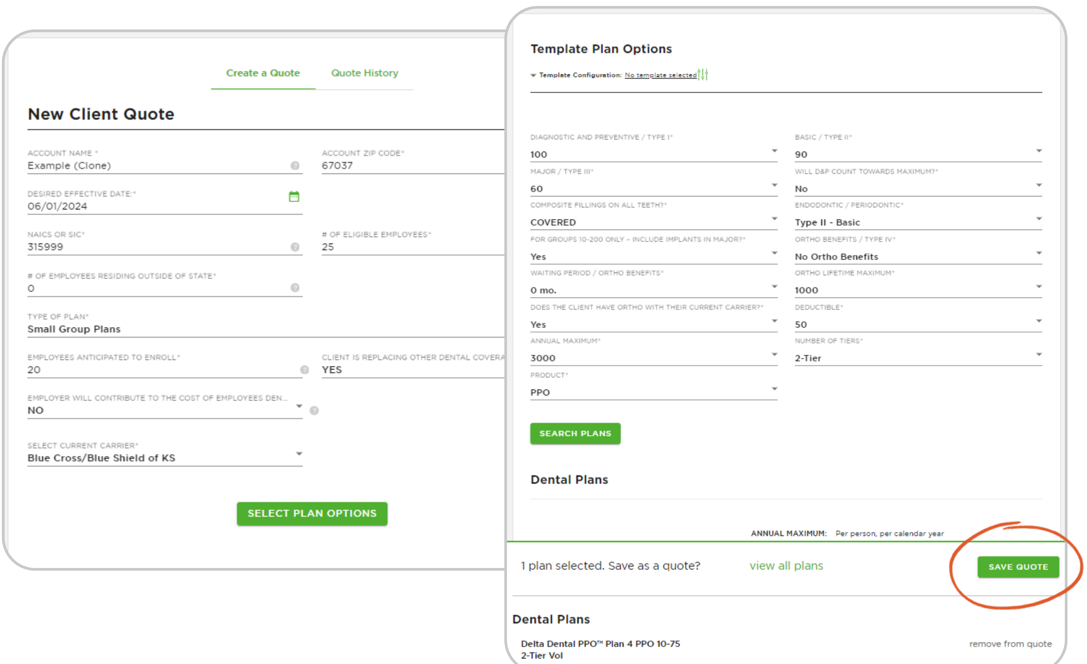


Edit or Clone a Quote

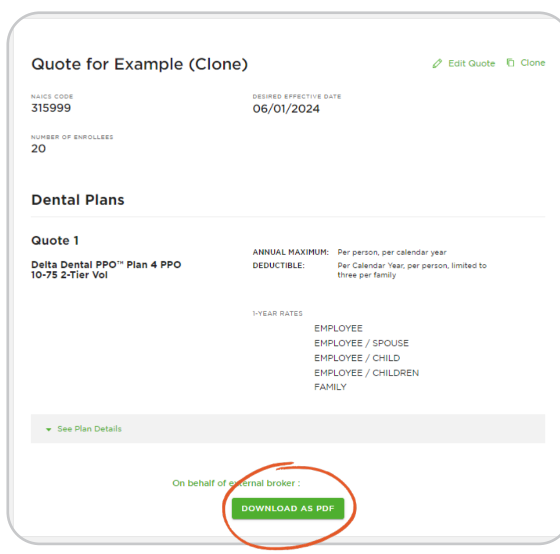
Online Broker Account User Guide

How to Edit or Clone a Quote

6 Once you make all the necessary adjustments, click **Save Quote**.



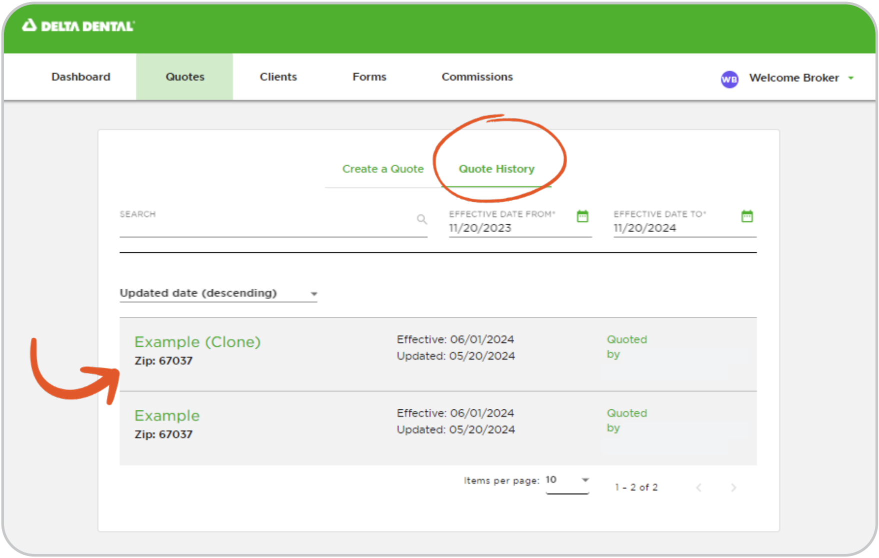
7 You will see your new quote to view and download as a PDF.



Edit or Clone a Quote
Online Broker Account User Guide

How to Edit or Clone a Quote

8. You can view the new quote in the **Quote tab** under **Quote History**.



Edit or Clone a Quote Watch Video

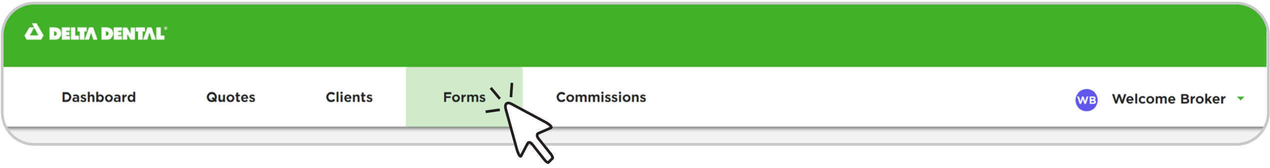
Watch this video to edit or clone a quote on the new online Broker Account.

Forms

Online Broker Account User Guide

How to Access Forms

1. You can view helpful documents and forms in categories by selecting the **Forms Tab** in the navigation bar.

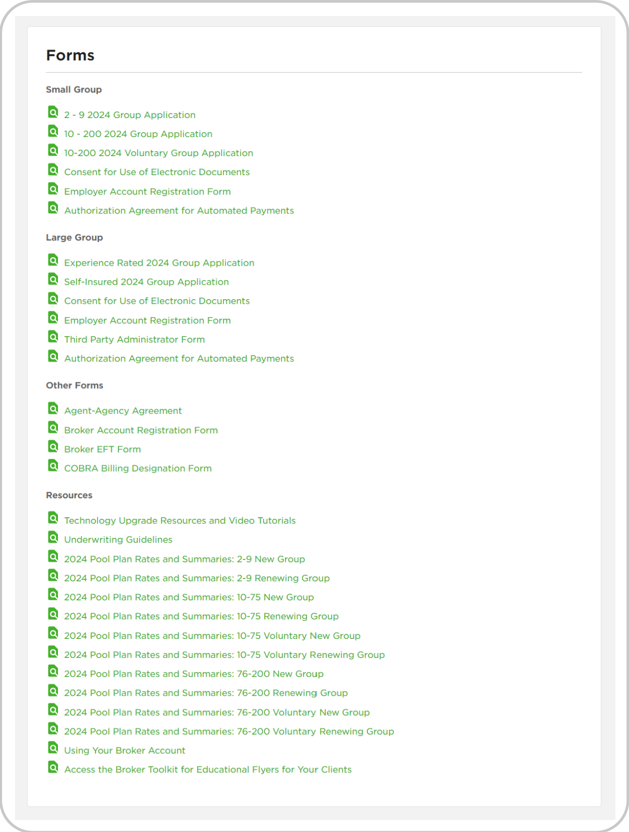


2. In the **Small Group** section, you will find the Small Group Applications, Employer Account Registration Form, and more!

3. Under **Large Group**, you will find the Experienced Rated/Self Insured Group Applications, Third Party Administrator Form and more!

4. Under **Other Forms**, you will find the Agent-Agency Agreement, Broker Account Registration Form and other miscellaneous documents.

5. Under **Resources**, you will find the Pool Plan Summaries and other resources.



Forms Watch Video

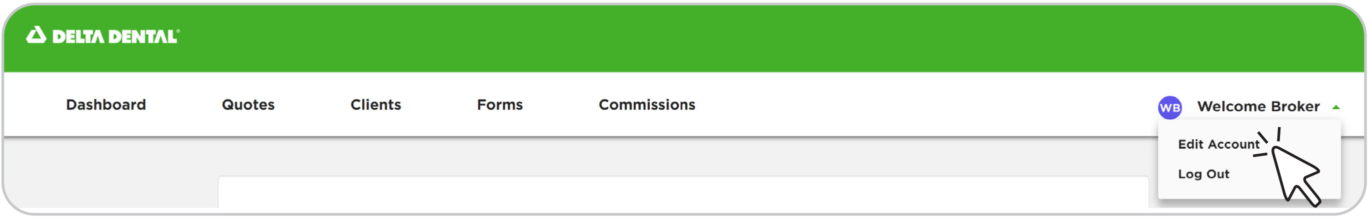
Watch this video to view forms and documents that will be available to you on the new online Broker Account.

Update Account Information

Online Broker Account User Guide

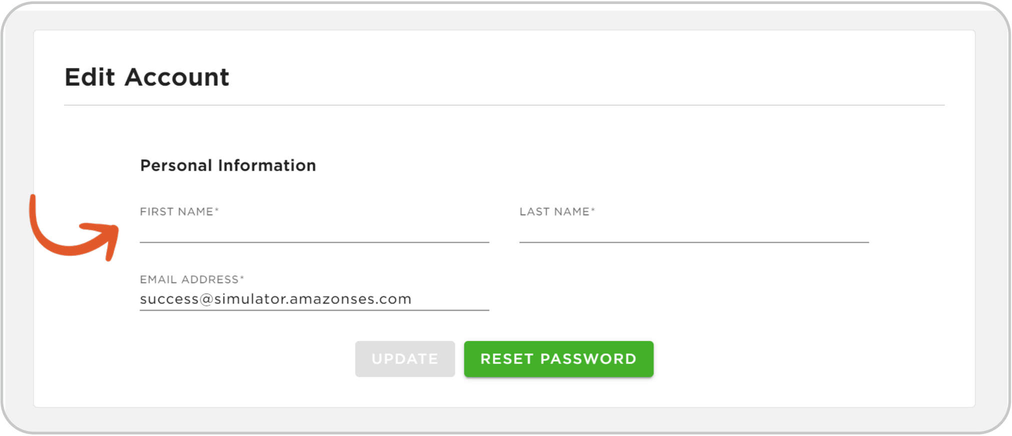
How to Update Your Account Information

1 You can edit your account information by clicking on your name and selecting **Edit Account.**



2 Quickly update your first name, last name, and/or email address under **Edit Account.**

3 Here you can also reset your password by clicking **Reset Password**.



Updating Account Information Watch Video

Watch this video to learn how to update your account information on the new online Broker Account.

DELTA DENTAL

Visit our Technology Upgrade Webpage

Upgrade Page

Our new layout gives easier navigation throughout your new online Broker Account. Right from the navigation bar you are able to find a patient, view claims, view payments, access documents, and more!

Updates

View updates and all communications about our technology upgrade.

Text Alerts

Receive notifications on the most up-to-date information on our technology upgrade, videos, educational resources all by signing up for text alerts.

Helpful Videos

Access helpful videos that show you all functionalities and how to navigate your online broker account.

Educational Materials

Access educational materials and a comprehesive user guide on how to navigate your online broker account.

Click here to visit our Technology Upgrade Page

Contact Us

We're here to help! We are upgrading our technology to continue to provide best-in-class service to our customers. We're committed to keeping you informed throughout the process.

Contact your Account Representative or the Client Help Desk at upgrade@deltadentalks.com with any questions you have about your new online employer account.

CLIENT HELP DESK
800-264-9462
Email – upgrade@deltadentalks.com

We look forward to serving you better!