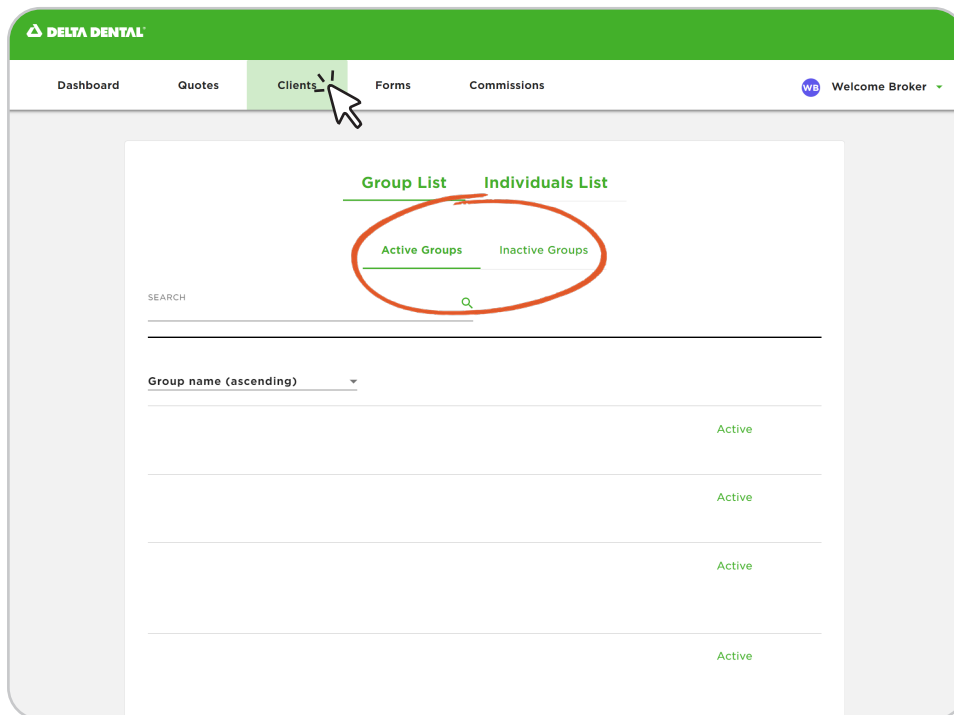


# Looking up a Client

## Online Broker Account

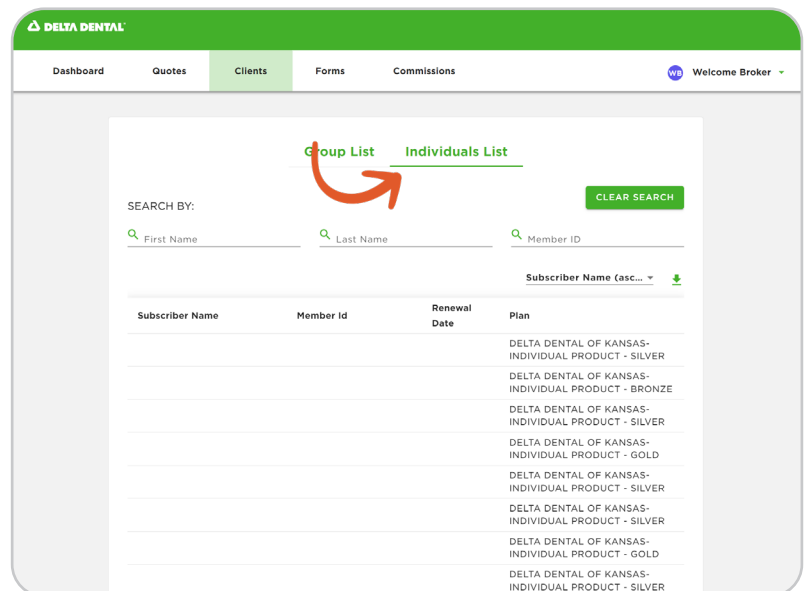
### ★ How to Look Up a Client

- 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

### ★ 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.

The screenshot shows the 'Individuals List' interface with search filters for First Name, Last Name, and Member ID. A dropdown menu is open for 'Subscriber Name (asc...)' with options for ascending and descending sorting. An orange arrow points from the 'Subscriber Name' dropdown to an Excel export button, which is also highlighted with an orange arrow. Below the interface is a preview of the Excel export file.

	A	B	C	D
1	Subscriber Name	Member Id	Renewal Date	Plan
2				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - GOLD
3				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - GOLD
4				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - SILVER
5				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - SILVER
6				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - BRONZE
7				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - SILVER
8				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - SILVER
9				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - SILVER
10				DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - SILVER

# Looking up a Client

## Online Broker Account

### ★ How to Look Up a Client

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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.

The image displays two screenshots of the Delta Dental online broker account interface. The top screenshot shows the 'Clients' tab with a search bar and a table of members. A red arrow points to a member name in the table. The bottom screenshot shows the 'Member Information' page for a selected member, with a red arrow pointing to the member name in the search results table.

**Delta Dental**

Dashboard Quotes **Clients** Forms Commissions Welcome Broker

Group List Individuals List

SEARCH BY:

First Name Last Name Member ID

CLEAR SEARCH

Subscriber Name (asc...)

Subscriber Name	Member Id	Renewal Date	Plan
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -
DELTA DENTAL OF KANSAS			INDIVIDUAL PRODUCT -

**Delta Dental**

Dashboard Quotes **Clients** Forms Commissions Welcome Broker

Group List Individuals List

< Back

Status: Active  
Plan Name: DELTA DENTAL OF KANSAS-INDIVIDUAL PRODUCT - SILVER  
Renewal Date: 01/01/2025

**Member Information**

FIRST NAME	MIDDLE NAME	LAST NAME
ID #	BIRTH DATE	GENDER
SSN	MARITAL STATUS	EMAIL
SEND EOB VIA EMAIL	ADDRESS	

**Dependents**

NAME	RELATIONSHIP	
DOB	SSN	GENDER
ADDRESS		

### ▶ 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.