



DELTA DENTAL OF COLORADO SYSTEM UPGRADE

# Broker Guide



# Changes to Smile About



This guide will help you navigate the broker portal and additional changes related to our system upgrade.



There are additional materials available on our resource library:  
<https://www.deltadentalco.com/resourcelibrary/>



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

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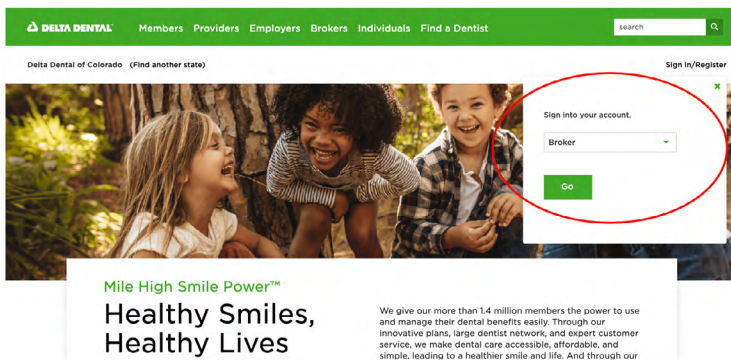
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## Logging in to the Broker Portal

### Creating an Account

- Go to **DeltaDentalCO.com**. Click on the **Brokers** link at the top of the home page and scroll down to **Create an Account** on the broker landing page. Click **Create an Account** and follow the instructions to complete your registration.



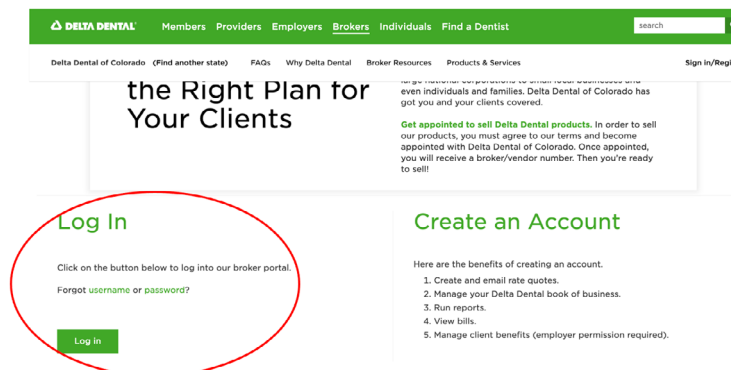
### Logging On

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**

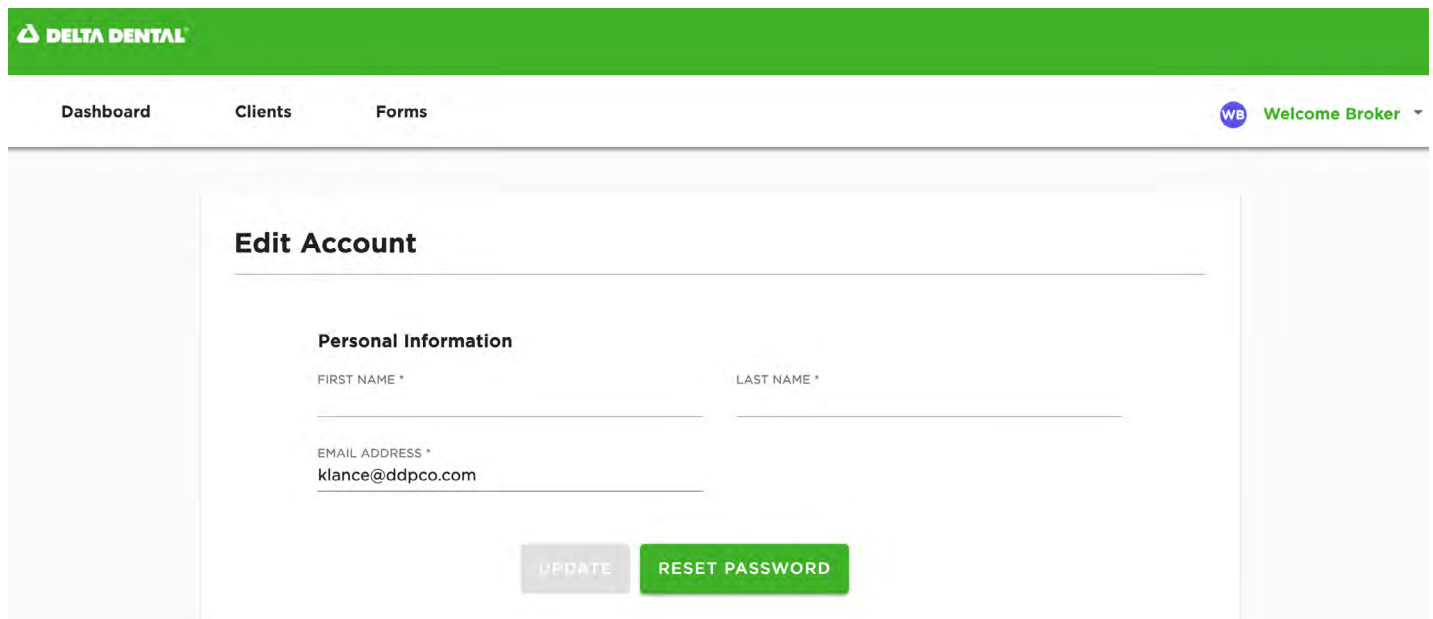


- If you forget your username or password, go to the Broker Log In page and click **Forgot Username or Password** to retrieve your information.

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## 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 Broker Portal interface. At the top, there is a green header with the Delta Dental logo and the text "DELTA DENTAL". Below the header, there is a navigation bar with "Dashboard", "Clients", and "Forms" links. On the right side of the navigation bar, there is a "Welcome Broker" dropdown menu. The main content area is titled "Edit Account" and contains a form for "Personal Information". The form has three input fields: "FIRST NAME \*", "LAST NAME \*", and "EMAIL ADDRESS \*". The email address field is pre-filled with "klance@ddpco.com". At the bottom of the form, there are two buttons: "UPDATE" (disabled) and "RESET PASSWORD" (active).

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## 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.

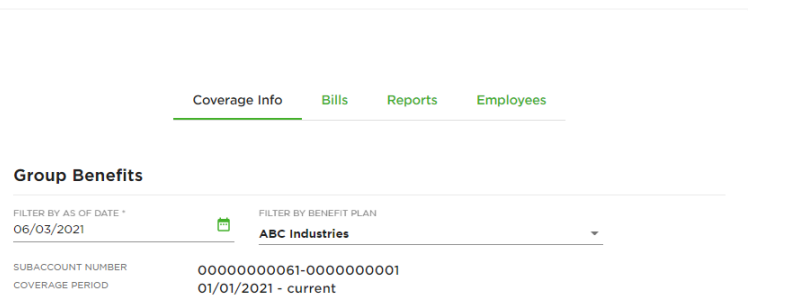
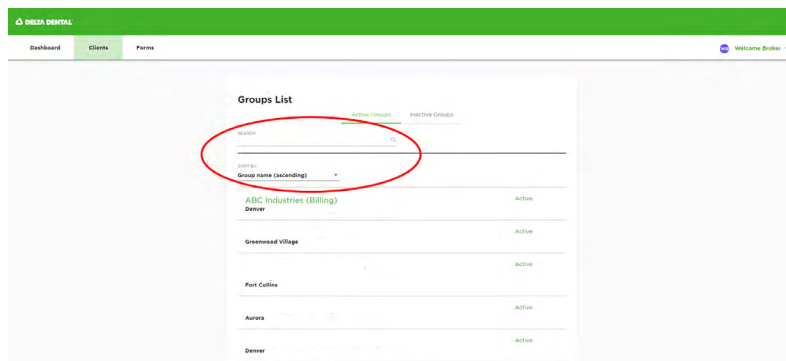
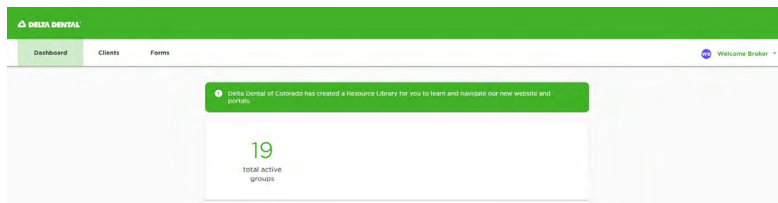
You can search your Groups by typing in a group name in the **Search** tab on top, or **Sort by** Group Name, Status, or Location.

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

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.



(Continued on next page)

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.

[Coverage Info](#)   [Bills](#)   [Reports](#)   [Employees](#)

---

### Group Benefits

FILTER BY AS OF DATE \* 06/03/2021     
 FILTER BY BENEFIT PLAN **ABC Industries**

SUBACCOUNT NUMBER 00000000061-0000000001  
 COVERAGE PERIOD 01/01/2021 - current

---

### Current Rates

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

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### Maximum Rule

BENEFIT CLASS	MAXIMUM TYPE	ALLOWED PPO / 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

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### Coverage Levels

DESCRIPTION	WE PAY PPO / PREMIER / OON	DEDUCTIBLE WAIVED PPO / PREMIER / OON	WAITING PERIOD PPO / 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

# Delta Dental of Colorado System Upgrade: Broker Guide

## 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 Industries	SUB ACCOUNT
SUB SUB ACCOUNT	DEPARTMENT
EMPLOYMENT STATUS	EMPLOYMENT TYPE
UNION STATUS	BENEFIT PLAN

GENERATE REPORT

**Summary**  
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.

**Your report is in process and will be sent via email to**

OK

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ood (Billin

UNT  
ries - Lakewood Manual (Membership)

STATUS  
EMPLOYMENT TYPE



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:** Minerva Cobos <mcobos@ddpco.com>  
**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.



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

**ABC Industries (Billing)**

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

Month	Members	Subscribers	Spouses	Dependents
February, 2021	5	5	0	0
March, 2021	11	11	0	0
April, 2021	12	12	0	0
<b>Total</b>	<b>28</b>	<b>28</b>	<b>0</b>	<b>0</b>
<b>Average</b>	<b>9</b>	<b>9</b>	<b>0</b>	<b>0</b>

Report Date: 04/06/2021  
 Sub Account: 0000000001-000000001



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## Billing

The **Bills** tab is a new feature available to brokers, providing eligibility and billing access to their clients. If you'd like access, please contact your sales executive.

You are able to view the groups' bills and approve them as they become available.


You can also view **recent bills** and **historical bills**.

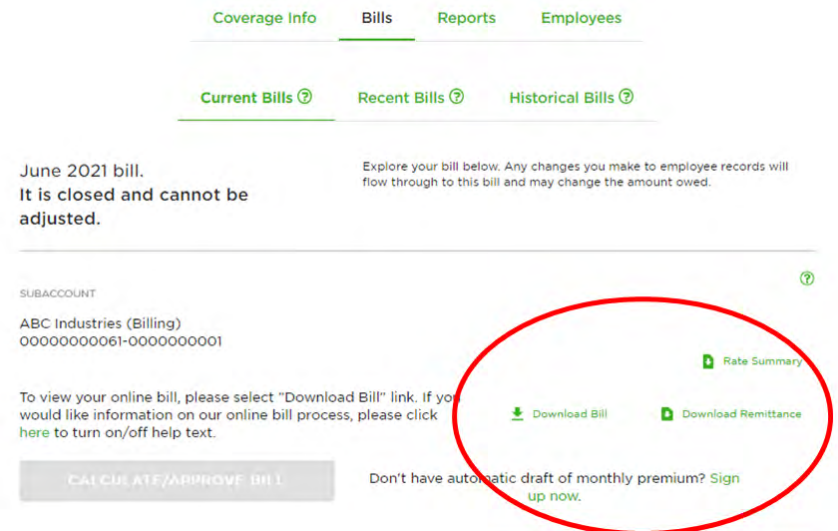
You can **Download the current bill** in PDF or EXCEL format.

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.



Coverage Info Bills Reports Employees

Current Bills Recent Bills Historical Bills

June 2021 bill. It is closed and cannot be adjusted.

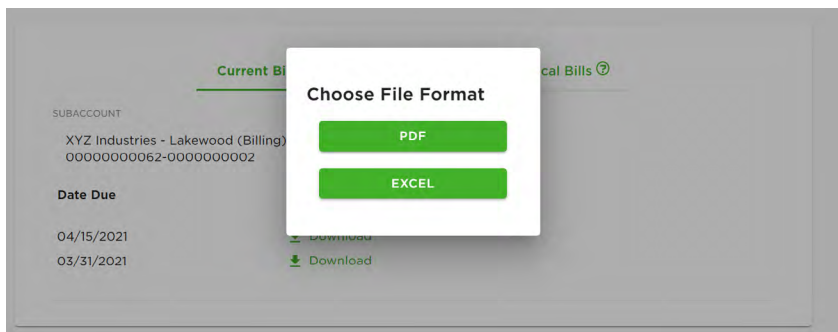
Explore your bill below. Any changes you make to employee records will flow through to this bill and may change the amount owed.

SUBACCOUNT  
ABC Industries (Billing)  
0000000061-000000001

To view your online bill, please select "Download Bill" link. If you would like information on our online bill process, please click [here](#) to turn on/off help text.

Rate Summary  
Download Bill  
Download Remittance

CALCULATE/APPROVE BILL Don't have automatic draft of monthly premium? Sign up now.



Current Bills

SUBACCOUNT  
XYZ Industries - Lakewood (Billing)  
0000000062-000000002

Date Due  
04/15/2021  
03/31/2021

Choose File Format  
PDF  
EXCEL

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: 00000000061-000000001  
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
<b>Total Amount Due</b>	<b>\$1,050.97</b>

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](http://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: 00000000061-000000001  
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 Premiun
2		Anderson	Jason	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
3		Anderson	Jason	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
4		Anderson	Lori	Fields	Active	Full-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
5		Anderson	Lori	Fields	Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
6		Anderson	Lori	Fields	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
7		Bodart	Carissa	Sales	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
8		Brown	James	Sales	Active	Part-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
9		Brown	James	Sales	Active	Part-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
10		Brown	James	Sales	Active	Part-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
11		Johnson	Haley	Sales	Active	Full-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
12		Johnson	Haley	Sales	Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
13		Johnson	Haley	Sales	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
14		Johnson	Lucas	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
15		Johnson	Lucas	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
16		Jones	Bob		Active	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
17		Jones	Bob		Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
18		Jones	Joe		COBRA	Full-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
19		Jones	Joe		COBRA	Full-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
20		Jones	Joe		COBRA	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
21		Martinez	Maria	Office	Active	Full-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
22		Nelson	Chris		Continuation	Part-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23
23		Nelson	Chris		Continuation	Part-Time	N	ABC Industries	SUBSCRIBI04-01-202		\$28.23
24		Shepperd	Derek		Disability/LTD	Part-Time	N	ABC Industries	SUBSCRIBI02-01-202		\$28.23
25		Shepperd	Derek		Disability/LTD	Part-Time	N	ABC Industries	SUBSCRIBI03-01-202		\$28.23



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## 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	08000000000102-01	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

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.

**Noah Oliver** ✎

Status: Active

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

**Employee Information**

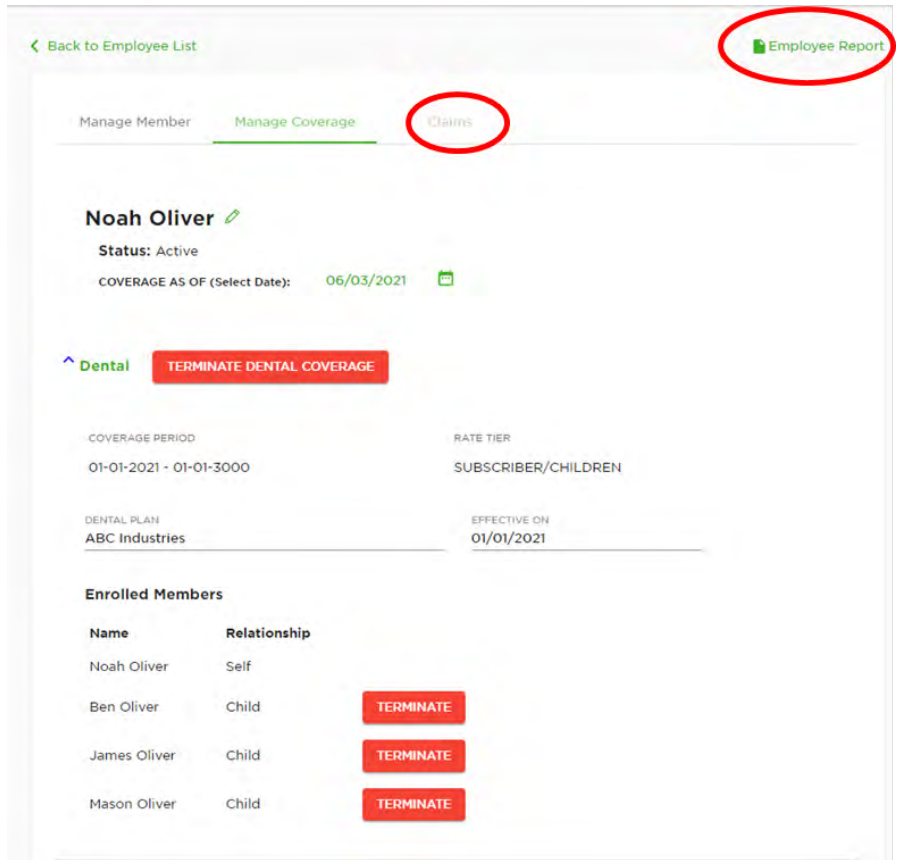
FIRST NAME Noah	MIDDLE NAME	LAST NAME Oliver
ID # 08000000000019-01	BIRTH DATE 03/03/1994	GENDER Male
SSN * XXX-XX-4713	MARITAL STATUS Single	DEPARTMENT
EMPLOYMENT STATUS Active	EMPLOYEE TYPE Contractor	UNION STATUS Yes

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 your sales executive or account manager to set it up.



# Delta Dental of Colorado System Upgrade: Broker Guide

## 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	RATE TIER
05-01-2021 - 01-01-3000	SUBSCRIBER
DENTAL PLAN	EFFECTIVE ON
XYZ Industries High Plan	05/01/2021

## Other Changes Impacting Groups

### Account Structure Changes

One of the biggest changes you'll see is how a group's account is structured, which will be highlighted by group number(s) going into one top account.

- With this change, you will be able to track and report new details (called attributes) about your group's members, such as their status, type, and what department they work in.
- This change will provide you with more robust tracking and reporting on your group's membership.
- This new functionality will impact enrollment, billing, and reports.

**\*\* For groups who submit eligibility electronically, they will continue to send those files in the same format, so there will be no changes to submitting EE files.**

- We will be mapping files into the new account structure.
- After the upgrade is completed, the way in which groups view billing, reporting, etc. will be under the top account.

Within the new structure, every group will have three account numbers: top account, sub-account, and sub-sub-account.

- For simplicity, top account is the group number preceded by zeros.
- Sub-account is the group's billing account. If the group doesn't have multiple billing contacts; they will only have one sub-account.
- Sub-sub-account is where the group's membership resides.

**The chart on the next page breaks it down further and shows examples.**

New Term	Definition	How it is Represented	Example
<b>Top Account</b>	This is the legal name of your business.	The Top Account number is your group number preceded by zeros to compose an 11-digit number.	00000123456 ABC Company, Inc
<b>Sub-Account</b>	Groups are billed at the Sub-Account level. Multiple Sub-Accounts are only necessary if you require multiple bills (e.g., there are different billing contacts for certain populations, bills are sent to multiple addresses or there is more than one billing cycle).	The Sub-Account is your Top Account number followed by a separate ten-digit number unique to a billing address.	00000123456-0000000001 ABC Company, Inc Foundation (Billing)  00000123456-0000000002 ABC Company, Inc Foundation Grantees (Billing)
<b>Sub-Sub-Account</b>	You will only have more than one Sub-Sub-Account if you have multiple eligibility sources (e.g., your active population is sent electronically but COBRA is submitted manually).  Membership resides at the Sub-Sub-Account level. Subscriber attribute information (department, COBRA, union, etc.) no longer define the number of sublocations that a group will have. These are now kept within the subscriber records.	The Sub-Sub-Account number will include your Top Account and Sub-Account numbers followed by 10-digits ending in the number of eligibility sources you use – electronic, manual, or both.	00000123456-0000000001-0000000001 ABC Company, Inc Foundation Manual (Membership)  00000123456-0000000001-0000000002 ABC Company, Inc Foundation EDI (Membership)  00000123456-0000000001-0000000001 ABC Company, Inc Foundation Grantees Manual (Membership)  00000123456-0000000001-0000000002 ABC Company, Inc Foundation Grantees EDI (Membership)

Note: To make it easier, if you are filling out paper forms or talking to any of our representatives about your account, you don't need all the zeros!

Contact your account manager or sales executive with any questions regarding account structure.



# Delta Dental of Colorado System Upgrade: Broker Guide

## Other Changes Impacting Groups

### Enrollment Attributes

- There will be five new attributes for members to be enrolled in: **employment status, employee type, union status, department, and benefit plan.**
- This will allow for more detailed sorting and tracking of your membership, and employees will no longer need to be tracked by separate locations.

### Enrollment Process

If you currently submit eligibility electronically, you will not need to adjust your file to the new structure at this time. We are mapping your sub-locations to the new structure.

If you use paper enrollment forms, you will need to use the updated form found on the portal to reflect the new account structure.

### Termination Dates




The format of termination dates is changing from “through date” to “to date”.

The new format will require you to enter the date AFTER the last date of coverage or date up to which coverage was active.

- For example: 1/1/2021 TO (but not including) 1/1/2022. Last day of coverage is still 12/31/2021
  - o Another way of looking at it is the termination date is now the first day without coverage.

The period that the member was covered is NOT changing, but you will see it on reports and when entering termination dates for members and/or accounts.



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## Other Changes Impacting Employer Groups

### Billing

For many of our groups, there will be some adjustments to billing cycles which will impact both when invoices are generated and when payments are due. We have outlined the changes below to show the invoicing and payment due dates. The calendars that follow offer a sample of scheduling. Be sure to refer to the titles for each calendar to determine which applies to your type of group.

If you have any questions regarding these billing changes, please feel free to reach out to our billing department at [billing@ddpco.com](mailto:billing@ddpco.com) or 303-889-8618.

#### Fully insured groups:

- If you receive a monthly invoice, there is no change to your billing cycle. Payment is due by the first of the month being billed.
- If your payment is made via draft on a monthly basis, beginning in September 2021, that will now occur only on the first business day of the month. There will no longer be an option to have your payment draft at any time.
- Monthly premiums for the upcoming month will be invoiced on the 7th business day beginning September 2021.

#### Self-funded groups:

- There will be changes to when your bills will be generated and they will be due upon receipt.
- Bills will no longer be included as attachments on your billing email notice. You will need to log in to the secure employer portal to view your bill.
- The calendars below will help guide you through the new dates.

#### Weekly:

- Claims will be invoiced every Tuesday and drafted every Wednesday.
- Final claims will be invoiced the last business day of the month and are due upon receipt.
- If your payment is made via draft, that will occur on the first business day of the following month. (If the last Tuesday of the month falls within the same week as the last business day, the final claims invoice will include all claims filed since the prior Tuesday.)
- Admin fees will be invoiced on the last business day of the month, and drafted on the 15th of the following month.

#### Monthly:

- Claims and admin fees will be invoiced the last business day of the month and are due on the 15th of the following month.
- If your payment is made via draft, that will occur on the 15th of the following month.

#### All groups:

- If the first day of the month or the 15th falls on a holiday or weekend, invoicing/drafting will default to the next business day.
- If the last day of the month falls on a holiday or weekend, invoicing/drafting will default to the previous business day.
- All groups will now be charged and credited for any retro eligibility changes incurred in that billing cycle.

# Fully Insured Sample Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 First business day ACH draft generated	2	3
4	5	6	7	8	9 Seventh business day Pre-bill month premiums invoiced	10
11	12	14	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

# Self-Funded Weekly Sample Calendar


	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
July					1 Prior month final claims drafted	2	3
	4	5	6 Claims invoiced	7 Claims drafted	8	9	10
	11	12	13 Claims invoiced	14 Claims drafted	15 Prior month admin fee drafted	16	17
	18	19	20 Claims invoiced	21 Claims drafted	22	23	24
	25	26	27	28	29	30 Last business day Final claims invoiced Admin fee invoiced	31

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
August	1	2 Prior month final claims drafted	3 Claims invoiced	4 Claims drafted	5	6	7
	8	9	10 Claims invoiced	11 Claims drafted	12	13	14
	15	16 Prior month admin fee drafted	17 Claims invoiced	18 Claims drafted	19	20	21
	22	23	24 Claims invoiced	25 Claims drafted	26	27	28
	29	30	31 Last business day Final claims invoiced Admin fee invoiced				

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
September				1 Prior month final claims drafted	2	3	4
	5	6	7 Claims invoiced	8 Claims drafted	9	10	11
	12	13	14 Claims invoiced	15 Prior month admin fee drafted Claims drafted	16	17	18
	19	20	21 Claims invoiced	22 Claims drafted	23	24	25
	26	27	28	29	30 Last business day Final claims invoiced Admin fee invoiced		

# Self-Funded Monthly Sample Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8	9	10
11	12	14	14	15 Prior month claims and admin fee drafted	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30 Last business day  Claims and admin fee invoiced	31




# Delta Dental of Colorado System Upgrade: Broker Guide

## Other Changes Impacting Groups

### Reporting

Reports will include the new account structure, tier rates, and enrollment attributes. If you have access to your group's reporting, you will be able to run reports from the broker portal. Once generated, the report will be sent to the email that is associated with the portal account. The email should be received almost instantaneously.



# Delta Dental of Colorado System Upgrade: Broker Guide

## Frequently Asked Questions

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

A change brokers and groups will see with the new system will be the way in which reports are received. In the current system, reports are generated and then displayed and available for download within the portal. In the new system, reports will still be triggered in the portal, but they will then be emailed 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.

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.

### Will there be any impact to commissions? Will brokers be able to access commission statements online?

Commissions will not be impacted by the system upgrade. Brokers will continue to receive commission statements as they do now.

### 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 your account manager.

### Will DDCO be sharing information about the system change with clients or will brokers be responsible for sharing that information?

DDCO has been communicating to both clients and brokers. On the resource library, there is a dedicated section for employer groups with guides and videos to help them learn about the new system.

If you have additional questions about the portal or system change, please contact your sales executive.