



Delta Dental of Minnesota
Employer Services Portal

User Guide

New Employer Services Portal - Immediate, Secure Changes to Your Member Information and More!

The Employer Services Portal (ESP) is your secure gateway to manage your client with Delta Dental. Your actions within the portal will be immediately effective. Member information is updated instantly, even when the patient is still at the dental office. The portal is easy to use, and there is online help within it.

ESP allows you to:

Manage Enrollment

- Enroll new members, update information on existing members or cancel members – all in real time
- Print subscriber ID cards

View Detailed Billing Information

- View your current billing reports
- Download Excel files of your subscriber listing for ease of reconciliation
- View historical bills up to 12 months
- View claim detail reports for our self-insured customers

View Detailed Benefit Information

- View detailed benefit information in an overview screen
- Indicators when benefits vary by category with clickable multi level abilities
- Ability to search code specific benefits
- View waiting periods by category if applicable

Manage Access (Designated Super Users only)

- Ability to manage your company's users
- Add and delete portal access as needed in real time
- Designate delegates to mirror Super Users' access

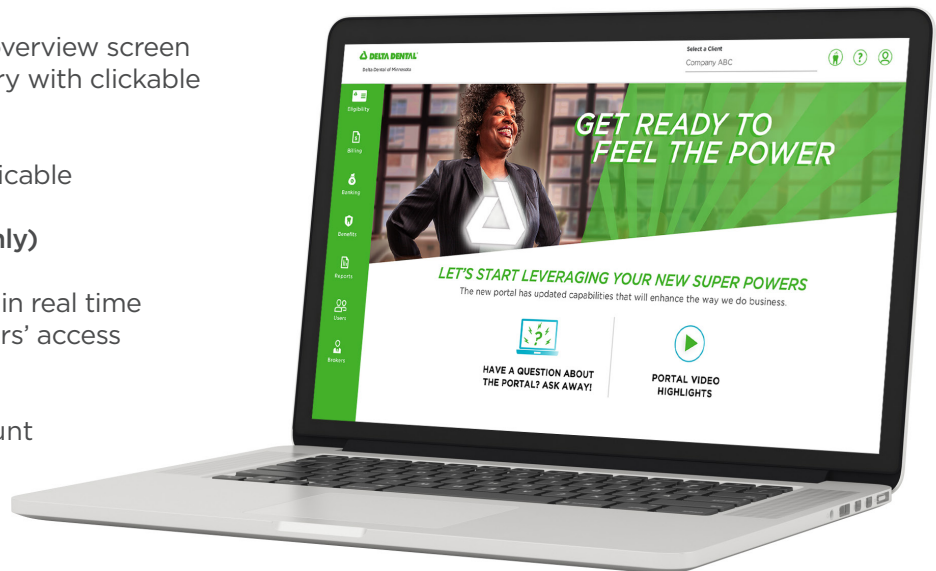
View Custom Client Reports

- Client and brokers can work with account managers to determine the experience reports that best meet their needs. Once reports are determined, they can be viewed within the portal.
- Available for our individually-rated customers

We're pleased to be your dental plan of choice and hope this guide is a useful tool in making your plan administration as effortless as possible. Our online tools make it easier to enroll, maintain member information, manage billing and more! **Save time – go online!**

Visit DeltaDentalMN.org/Employers for online resources specifically for group administrators.

Access commonly used forms, employer FAQs and helpful oral health and dental insurance information to share with your employees. This webpage is also where you can log in to ESP.



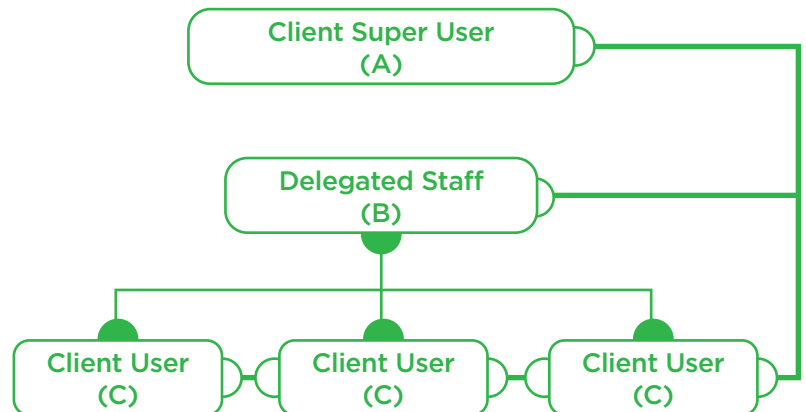
ESP Registration

To gain Client Super User access, please fill out the registration form found on pages [10 and 11](#). For a Client Administrator at a brokerage firm, the form can be found on pages [12 and 13](#).

Send the completed form to ClientSuperUser@DeltaDentalMN.org. Once processed, the new Client Administrator will receive an email with instructions on setting up their account on ESP. See page [4](#) of this guide for detailed steps.

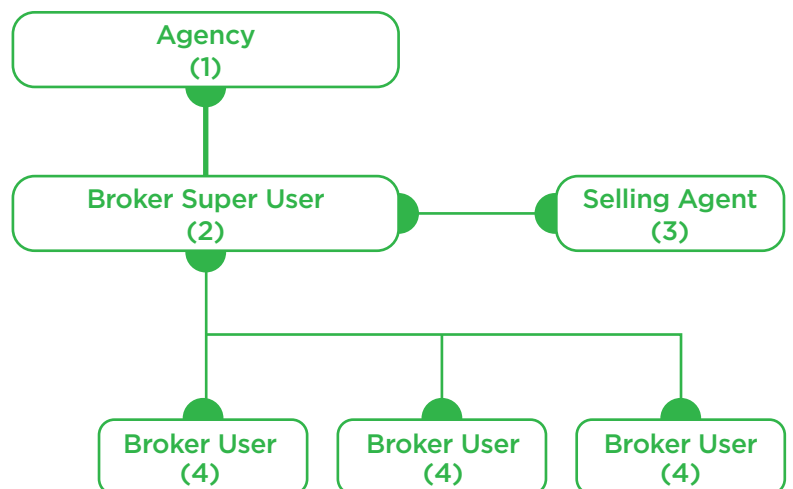
Client Super Users:

Client Super Users(A) have complete access to their client account, and can delegate permissions to additional staff(B). This delegate role assumes the same permissions as the Client Super Users. The Super User or delegate can easily set up additional portal users(C), assign appropriate security levels for Client Users, and remove access when a user leaves the company.



Broker and Agency Partners:

For our broker and agency partners(1), Broker Super Users(2) can be assigned by selling agent(3). Each agency Broker Super User can have access to all clients sold by that agent. Agency administrators can set up Broker Users(4), update/view eligibility, view and download billing reports, view client benefits and access individually-rated clients customized reports.



Accessing ESP

Here are your simple steps For access:

1. Once a new user is created, you will receive an email from PortalSupport@DeltaDentalMN.org containing a link to claim your account, set your password and gain access to the portal.
2. When you click the link, you will be directed to a Claim Account page. Have your client number handy, you will need this when setting up your account. Client numbers are six digit numbers found within your welcome email and also on ID cards, benefits summaries, invoices and your contract. For agencies, you will need to have your TIN handy.
3. Once your account is set and you've logged in, click on Users on the left navigation bar. This is where you can add and manage users.
4. You can delegate, update or view eligibility access and billing reports for the entire client, as well as by subclient.

Claim Account

To secure your Employer Service Portal account, please enter the unique identifier associated with your account (Client Users = 6-digit Client ID, Broker Users = 9-digit Agency TIN).

Once confirmed, you will be able to create your account password.

LOGIN NAME CLAIM.ACCOUNT.ESP@ESP.NET

EMAIL ADDRESS
claim.account.esp@esp.net

UNIQUE IDENTIFIER (CLIENT ID OR AGENCY TIN)

Your Client ID:

- The Client ID is your 6 digit group number
- It can be found on mail and email communications from Delta Dental of Minnesota
- It may also be referred to in contract or summary plan description documents that you received from Delta Dental of Minnesota

Submit

Cancel

To create a new Client Delegate:

1. Select Users on the left navigation bar.
2. Select Add User.
3. Enter required user information, including selection of the User ID. The User ID may be the same as the user's email.
4. Select the role of Client Delegate.
5. The Client Delegate's permissions will update to automatically match the Client Super User.
6. Hit Save.
7. Click on User Admin in the page header to return to the Manage Client Users tab.

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Delta Dental of Minnesota

Select a Client Client

?

?

?

Eligibility

Info

Benefits

Reports

Users

User Admin/Add Client User

User Information

*Denotes required field

☒ Use email address for User ID

First Name Last Name Email Address & User ID Role

Title Phone Number Company

Permissions

Set permissions for each client and/or sub-client for new user to limit or grant access.

☒ Show Sub-Clients

| Client Number | Client Name | Update/View Eligibility | Read Only Eligibility | Billing | Claims Details | Custom Reports |
|---------------|---------------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|----------------|
| 000001 | Client | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | No Access |
| 0001 | Client | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | No Access |
| 0002 | Client | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | No Access |
| 0003 | ND Option 1 - Cobra | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | No Access |
| 0004 | ND Option 2 - Cobra | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | No Access |

Create a new user:

1. Select Users on the left navigation bar.
2. Select Add User.
3. Enter required user information, including selection of the User ID. The User ID may be the same as the user's email.
4. Select the Role of Client User.
5. The Company field will be pre-populated with your company.
6. In the Permissions grid, select the permissions you want the new user to have.
7. To apply different permissions at the subclient level, select the check box Show SubClients and select the appropriate permissions for selected subclients.
8. Hit Save.
9. Click on User Admin in the page header to return to the Manage Client Users tab.

DELTA DENTAL Delta Dental of Minnesota

Select a Client: Client

User Admin/Add Client User

User Information

*Required required field

☒ Use email address for User ID

First Name: New Last Name: User Email Address & User ID: new.user.asp@insp.net Role: Client User

Title: Phone Number: Company: Demo Client

Permissions

Set permissions for each client and/or sub-client for new user to limit or grant access.

☒ Show Sub-Clients

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| 0004 | ND Option 2 - Cobra | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | No Access |

Additional help topics can be accessed by clicking the question mark icon at any time.
For additional assistance on how to use the portal, please contact our portal support team at **1-866-398-9480**.

To access the Employer Services Portal, visit DeltaDentalMN.org/Employers.

Managing Member Enrollment Information & Adding a Member

You have the ability to add a primary member (subscriber) or add family members to an existing subscriber. Once logged in, click on Eligibility on the left navigation bar.

1. Click on the Add Subscriber tab.
2. Confirm the client selected or select another from your list by searching a client name in the Select a Client field. Users may only add members into the client or subclient that they can access.
3. Enter the subscriber's Social Security Number (SSN) twice to verify. The SSN must be unique within the system. If you receive a message that the SSN is not unique, call or email portal support via the contact information at the bottom of the page.
4. The Add Subscriber screen will display. Select the intended subclient and fill in the member's information, making sure to fill in any required fields, as well as the subscriber's address. Click submit.
5. Once submitted, the Subscriber Overview screen will display the new subscriber.
6. Next, you are able to add a spouse and/or dependents, print ID card, or add special attributes.

Note: If enrolling a subscriber with dependent coverage, select Add Dependent once you successfully save the subscriber's demographics.

1. On the Add Dependent screen, enter the required information: you will only need to enter dependent type, first name, date of birth (DOB), and gender.
2. You may select to apply the subscriber's address to the dependent by clicking the check box above the address field.
3. Select Save or Save and Add Another if enrolling additional family members. .

The screenshot displays the Delta Dental Minnesota website's 'Eligibility' section. A green sidebar on the left contains navigation links: Eligibility, Billing, Banking, Benefits, Reports, and Users. The main content area is titled 'Eligibility' and features two tabs: 'Search Subscribers' and 'Add Subscriber'. The 'Add Subscriber' tab is active, showing a form with the heading 'Add Subscriber' and a note: 'Subscriber ID must be unique to add new user'. The form includes a 'Select a Client' dropdown menu, a 'Subscriber ID' field with the value '888888888', and a 'Confirm Subscriber ID' field with the value '888888888'. A green '+ Add' button is positioned to the right of the confirmation field. At the bottom of the page, there is a footer with links for Privacy Policies, HIPAA Privacy Notice, Website Security, Language Assistance, and Notice of Non-Discrimination. It also includes copyright information for 2020 Delta Dental and its affiliates, and contact information for the Services Portal: Customer 866-398-9480 and Service 651-348-3223 (local).

Managing Member Enrollment Information & Updating Members

You can update a member's name, address and other eligibility information on the Subscriber Overview page. When you update certain subscriber information, such as last name and eligibility effective date, you are given the option to apply these changes to the family members also.

1. On the Eligibility landing page, you may search for a subscriber by ID or name. Simply select the Search By option for either ID or Name. ID is selected by default.
2. Enter the subscriber's member number (SSN or client-assigned ID) or first name and last name.
3. The search results will display with the matching member(s). Select the hyperlinked Subscriber ID.
4. The Subscriber Overview page will appear.
5. From the Subscriber Overview, you are able to:
 - **Edit information:** Select the Edit Info button to change the subscriber's information.
 - **Transfer** to another accessible client or subclient: Select the Transfer button. Enter required information and select Save. **Note:** You will be offered the choice to transfer related dependents at the time of transferring a subscriber.
 - **Terminate an active member:** Select the Term button to open the termination pop-up. Enter required information and hit Save.
 - When a subscriber is terminated, any members under that subscriber are also terminated with the same effective date.
 - A member is not allowed to have a termination date earlier than the date of service on the last paid claim. If this is the case, the system will reset the termination date accordingly.
 - **Reinstate an inactive member:** Select the Reinstate button to open the Reinstate pop-up. Enter required fields and save. **Note:** You will be offered the choice of reinstating related dependents that meet age requirements.
 - **Add dependents:** Select the Add Dependent button. The Add Dependent page will display. Enter required information and hit Save.
 - **Update dependents:** Click on the hyperlinked last name of the dependent to be updated. This will open the Dependent Overview screen. From there, you are able to manage many of the same actions as the subscriber: Edit Info, Terminate and Reinstate.

| Subscriber ID | Subscriber Last Name | Subscriber First Name | Subscriber Birthdate | Sub-client Number | Sub-client Name | Eligibility Status | Effective Date |
|---------------|----------------------|-----------------------|----------------------|-------------------|--------------------|--------------------|----------------|
| 0000000001 | Subscriber | How | 01/01/1980 | 0001 | Demo BMT subclient | Active | 08/01/2020 |
| 0000000002 | Subscriber | How | 01/01/1980 | 0001 | Demo BMT subclient | Active | 08/01/2020 |

Printing Subscriber ID Cards

After searching for and selecting a subscriber, click on the Replacement ID Card tab to either download and print a PDF of the subscriber's ID Card, or request for a replacement card to be mailed.

| Client-Sub-client | Eligibility Status | Eligibility Status Reason |
|--|--------------------|---------------------------|
| DEMO01 - 0003 Demo Benefit Manager Toolkit Client, Demo BMT subclient | Active | Transfer |

| Coverage Type | Effective Date |
|------------------------------|----------------|
| Subscriber, Spouse, Children | 08/03/2020 |

Adding Special Attributes To Member Records

ESP users are able to update special attributes (for example COBRA*, student, disabled, etc.), for members and dependents within the client and subclient number that they can access.

*Clients without a COBRA subclient can utilize this attribute. If client has a COBRA subclient then use the transfer function.

1. You can add a special attribute when adding a subscriber or dependent or by searching for an existing member.
2. In the bottom section of the Add or Overview screen, select the Add button next to Special Attribute.
3. You can choose the type of attribute from the drop-down and add the effective date for the attribute. If there is an end date that should be entered, update the Through Date field.
4. The attribute will appear in a list. Make sure the attribute is selected, then click Done.
5. The attribute will now show on the Subscriber Overview screen.
6. To add an attribute to a dependent, select the hyperlinked last name to open the Dependent Overview page. Follow the instructions above to add an attribute to the dependent's record.

The screenshot shows a web form for adding or updating member information. At the top, there are fields for Address Line 2, City (St Paul), Zip (55106), State (Minnesota), Country (United States), Email, Cell Phone, and Fax Number. Below these is the 'Special Attributes' section, which includes a 'Type' dropdown menu (currently set to 'Select Type'), an 'Effective Date' field (mm/dd/yyyy), and an 'End Date' field (mm/dd/yyyy). There are two green buttons with plus signs: 'Add Special Attribute' and 'Add Designated Representative'. At the bottom of the form are 'Save' and 'Cancel' buttons. The footer contains legal disclaimers, a copyright notice for 2020 Delta Dental, and contact information for the Services Portal (Customer: 866-398-9480, Service: 651-348-3223 local).

Helpful Reminders:

- Changes are immediate.
- Electronic files are most efficient.
- It's important that all information is accurate and complete.
- To avoid claims, benefits or billing questions, be sure to submit member information promptly and accurately.
- Retroactive changes are limited to 90 days and terminations will not be made effective prior to paid claims.
- Take note of eligibility cutoff dates so you are prepared for invoice changes.

One-Time Load Process or Multiple Changes

If you have 20 or more changes, our system allows for an upload of a spreadsheet in a pre-defined format, saving time and ensuring accuracy.

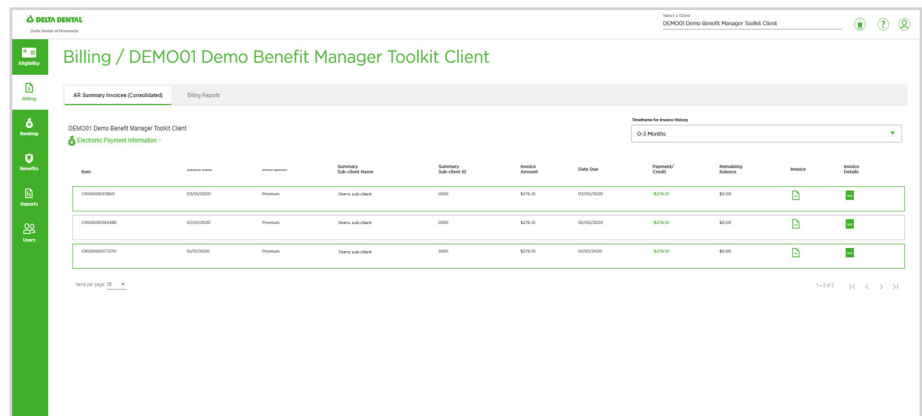
For more information, please contact your Delta Dental representative.

Billing Reports

For users with access to billing, you can view consolidated invoices and billing by accessing the Billing icon on the left navigation bar.

The landing page for billing will display Accounts Receivable summary information for the client and subclients you can access.

The information displayed is related to AR Summary (consolidations)* billings for the client selected. The most recent billing activity is shown at the top. You may view further historical events by selecting the Timeframe for Invoice History drop down.



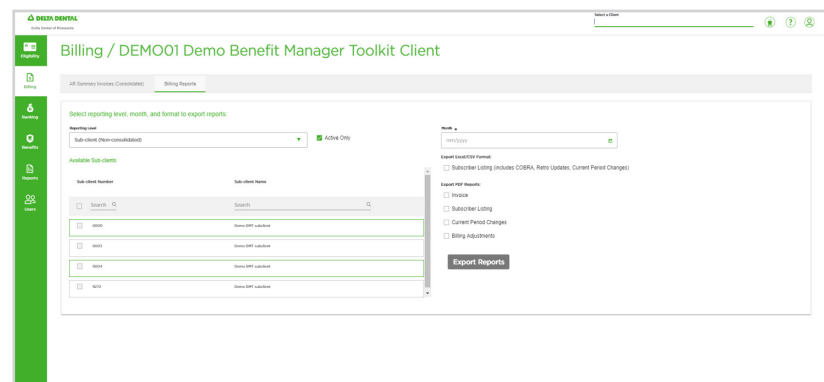
The screenshot shows the 'Billing / DEMO01 Demo Benefit Manager Toolkit Client' page. It features a table with columns: Invoice Number, Invoice Date, Invoice Type, Subclient Name, Subclient ID, Billing Period, Date Due, Amount Due, Amount Paid, and Amount Owed. The table lists three invoices for the 'DEMO01 Demo Benefit Manager Toolkit Client'.

| Invoice Number | Invoice Date | Invoice Type | Subclient Name | Subclient ID | Billing Period | Date Due | Amount Due | Amount Paid | Amount Owed |
|----------------------|--------------|--------------|--|--------------|----------------|------------|------------|-------------|-------------|
| 00000000000000000000 | 01/01/2020 | Premium | DEMO01 Demo Benefit Manager Toolkit Client | 0001 | 01/01/2020 | 01/01/2020 | \$10.00 | \$0.00 | \$10.00 |
| 00000000000000000000 | 02/01/2020 | Premium | DEMO01 Demo Benefit Manager Toolkit Client | 0001 | 02/01/2020 | 02/01/2020 | \$10.00 | \$0.00 | \$10.00 |
| 00000000000000000000 | 03/01/2020 | Premium | DEMO01 Demo Benefit Manager Toolkit Client | 0001 | 03/01/2020 | 03/01/2020 | \$10.00 | \$0.00 | \$10.00 |

* The AR Summary invoices summarize a total amount due for all the subclients within a client (aka fund) and allows for one payment to be applied to all subclients.

To view all report types and access reports at the subclient level, go to the Billing Reports tab. You will be able to select:

- The desired Report Level (AR Summary vs. Subclient level).
- The data range - select one month at a time.
- The specific subclient(s) you want reports for.
- The type of report and format.



The screenshot shows the 'Billing Reports' tab in the 'Billing / DEMO01 Demo Benefit Manager Toolkit Client' page. It includes a 'Select reporting level, month, and format to export reports' section with a 'Reporting Level' dropdown set to 'Subclient (Non-consolidated)' and a 'Month' dropdown set to '01/2020'. Below this is a table of 'Available Sub-clients' with columns for Sub-client Number and Sub-client Name. The table lists four subclients: 0001, 0002, 0003, and 0004, all named 'DEMO01 Demo Benefit Manager Toolkit Client'. To the right of the table are checkboxes for 'Export PDF Reports', 'Subscriber Listing', 'Current Period Changes', and 'Billing Adjustments', along with an 'Export Reports' button.

Invoice – All related invoices for the client and the month selected will generate in PDF format. Types of invoices include:

- Claims Invoice and Admin Invoice (for self-funded clients).
- Standard Invoice for fully-insured clients.
- Percentage of Claims Paid Invoices – available only at the subclient level.

Claims Detail Reports – Reflect all claims paid at the subclient level for the period accompanying the invoice.

Subscriber Listings – Reflect all active subscriber enrollment by subclient for the period of the invoice.

Subscriber Listings – Reflect all enrolled subscribers accounted for on the Premium or Admin invoice.

Current Period Changes – Reflects all adds and terms that occurred between the last billing period and the current period. Included as a tab on the Subscriber Listing report.

- The invoicing process begins when Billing contact(s) receive a system generated email notifying that the billing reports are available online. The email includes a link to ESP.
- Users access ESP in order to view the invoices, subscriber listings and claims detail reports.
- Reports history is unlimited.



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[DeltaDentalMN.org](https://www.DeltaDentalMN.org)