Delta Dental of Minnesota

Service Portal User Guide

DELTA DENTAL®

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

Our Service Portal is your secure gateway to manage your group with Delta Dental. With the portal, you see the results of your actions immediately. Member information is updated instantly, even while the patient is still at the dental office. The toolkit is easy to use, and there is extensive online help within the application.

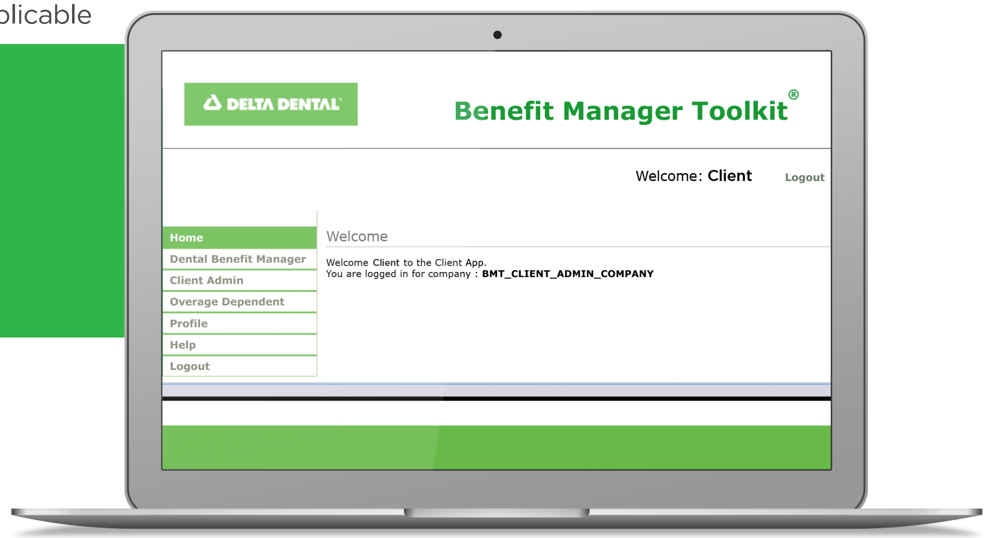
Our Portal allows you to:

Manage Enrollment
- Enroll new members, update information on existing members or cancel members – all in real time
- View summary of enrollment changes in your session
- 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 drill down abilities
- Ability to search code specific benefits
- View waiting periods by category if applicable

Manage Access: Designated Super Users have
- 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!**

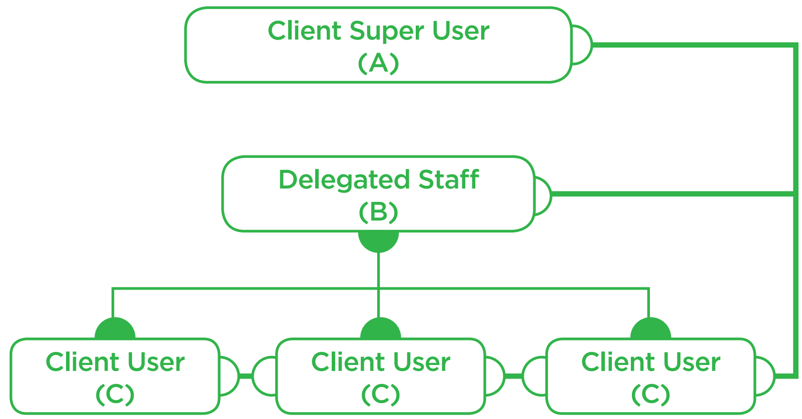
Visit DeltaDentalMN.org/Employers for online resources specifically for group administrators. There, you can access commonly used forms, employer FAQs and helpful oral health and dental insurance information to share with your employees. This webpage is also where you can log in to our secure Services Portal.

Portal Registration

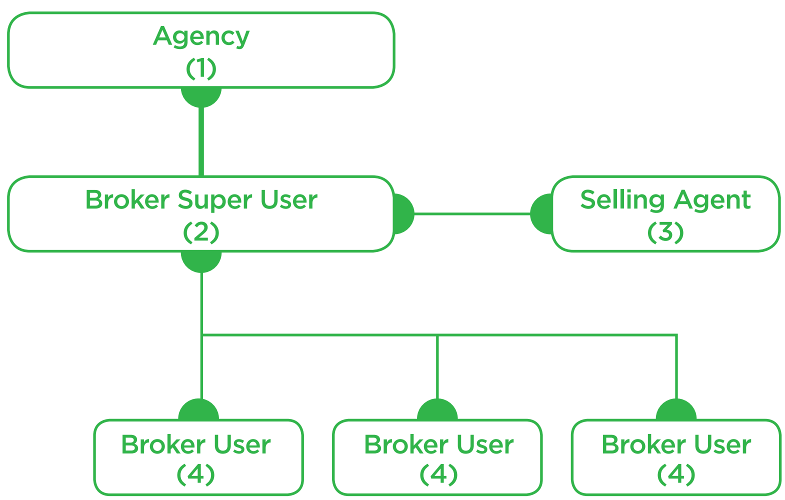
To gain access as a Client Super User to the Services Portal, please fill out the registration form found on pages 10 and 11. For a **client administrator at a brokerage firm,** the form can be found on pages 12 and 13.

Send the completed form to Clientsuperuser@DeltaDentalMN.org. When processed, the new client administrator will receive an email with instructions on setting up an account for BMT. See page four of this guide for detailed access steps.

Client Super Users:
Client Super Users[A] have complete access to their group's account, and can delegate permissions to additional staff[B]. This delegate role can assume the same permissions as the client Super Users. The Super User or delegate can easily set up new portal users[C] with passwords, assign appropriate security levels for client users, and disable access when a user leaves the company.

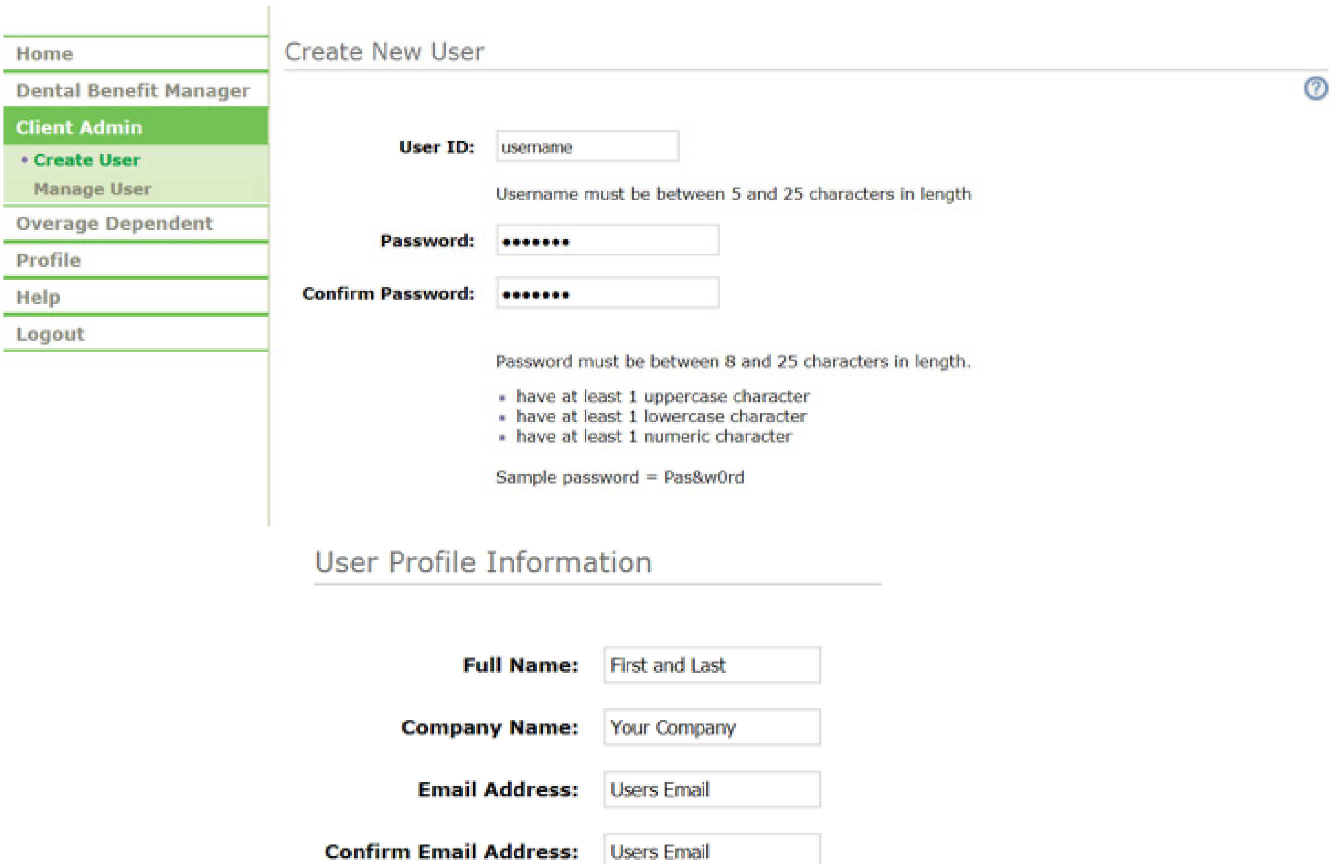


Broker and Agency Partners:
For our broker and agency partners[1], Broker Super Users[2] can be assigned by selling agent[3]. Each agency Broker Super User can have access to all clients sold by that agent. Agency administrators can set up broker users[4], update/view eligibility, view and download billing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

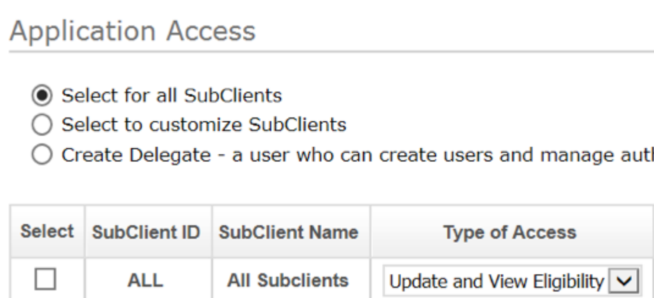


Here are your simple steps to access the Services Portal:

1. You will receive an email from DoNotReply@MyDeltaDental.com containing a link to the portal registration page.
2. When you click the link, you will be directed to a registration page. Use the access code from the email for verification. 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 registered and logged in, click on **Client Admin,** create user. This is where you can add and manage users.



4. You can delegate, update or view eligibility access and billing reports for the entire group, as well as by subclient.



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

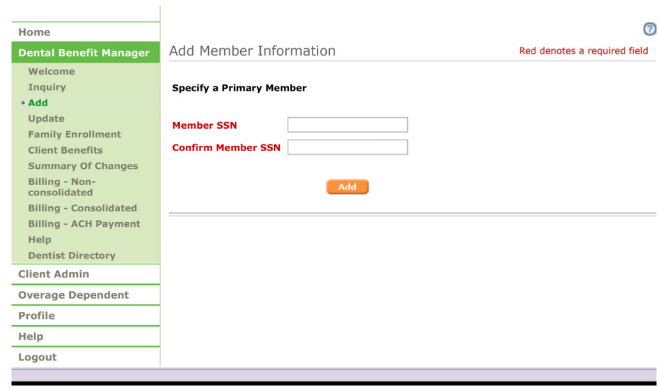
To access the Employer Services Portal, visit DeltaDentalMN.org/Employers.

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. Log in and select **Add** from the Dental Benefit Manager submenu on the left side of the screen.

1. Enter the subscriber's SSN.
2. Enter the client-subclient information. Users may only add members into the client-subclient number that they have access to.
3. The **Add Member** screen will display. Fill in the member's information, making sure to fill in any required fields, as well as the subscriber's address. Click submit.
4. Once submitted, the **Family Composite** screen will appear, displaying the new subscriber. On this screen, you are able to add a spouse and/or dependents, print ID card, or perform a member search.

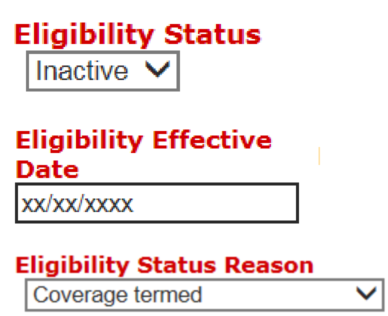


5. Note: If enrolling a subscriber with dependent coverage, select Family Enrollment, once you enter the subscriber's demographics, select add dependent, on the Dependent screen you will only need to enter Dependent Type, First Name, DOB, and Gender. Click **Update.**

Updating Members

You can update a member's name, address and other eligibility information in the **Update Member** screen. 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 as well.

1. Enter the subscriber's member number (SSN or client-assigned ID).
2. If the correct member is displaying, click the **Update** button on the far right, under **Options**.
3. The **Update Member** screen will appear and the member's information can be updated.
4. The subscriber or family members can be terminated or reinstated on this screen using **Eligibility Status**.
   - To terminate a member, change the **Eligibility Status** to **Inactive** and enter the termination date in the **Eligibility Effective Date** box. Be sure to enter the 1st day without coverage. For example, if a member terminates the end of the month on 12/31, enter 01/01/xxxx
   - 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.



Over-age Dependent Process

When a subscriber's dependent child reaches the maximum age on the plan, the overage dependent contact (usually the client administrator) will receive an email notifying you to access an over-age dependents report and letter on the portal. Delta Dental will automatically cancel the coverage for this member. The notification is simply a vehicle for you to contact the subscriber to inform them, or to offer COBRA where appropriate.

Accessing your over-age dependents is easy! Once logged into the portal:

- Select **Overage Dependent** in the left navigation menu
- Enter your client number (this is the six-digit number found on your ID card, an EOB, or your company's billing statement)
- Enter your subclient number (this is the four-digit number found on an EOB or your company's billing statement)
- Once entered, you can either view the letter or download a spreadsheet.

Printing Member ID Cards

After entering enrollment or from the inquiry screen you can print a card, perform a new member search, or transfer to another sub client.

Family Composite

Plan: DDNE
Client-SubClient: 100000 - 0001
Member Name: Member Name
SSN: 00000001
Client Assigned Id: 100000001

Internal COB: No
External COB: Yes
COB Tracking: No
Product: Delta Dental PPO plus Premier
Coverage Type: Subscriber and 1 Child

Family Information

Name	Birth Date	Dependent Type	Eligibility Status	Eligibility Effective Date	Special Attribute	Options
test test	08/25/1998	-	Active	01/01/2018		Update
child test	01/01/2015	Non-Spouse	Active	01/01/2018		Update

New Member Search | **Print Card** | Transfer | Copy | Add Dependent

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Printed 01/04/2018

PLAN: **DDNE**
NAME: **Member Name**
CLIENT: **Client Name**
CLIENT NO: **000001**
SUBSCRIBER ID: **000000001**

Submit Claims to:
P.O. Box 9120, Farmington Hills, MI 48333-9120
Customer Service: (866)827-3319
www.deltadentalne.org

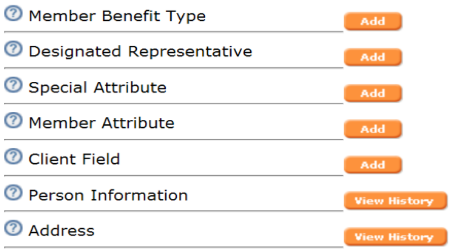
This card is for identification purposes only and is not a guarantee of coverage.

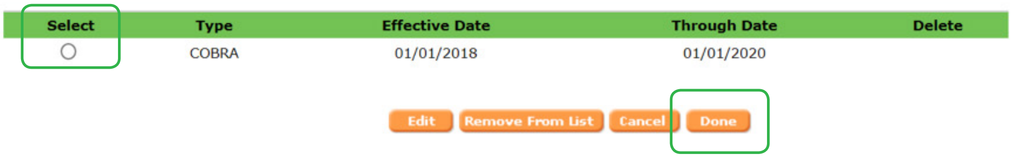
Adding Special Attributes To Member Records

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

*Clients with out a COBRA subclient can utilize this attribute. If client has a COBRA subclient then use the transfer function.

1. Once you select the member and/or dependent, the **Update Member** screen will appear.
2. 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.**





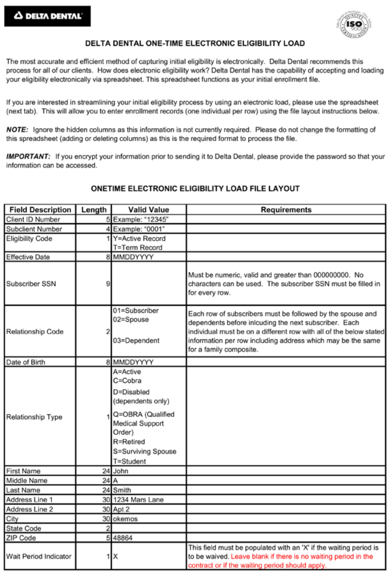
5. Once you have added the special attribute , be sure to select it from the list and click done to apply the attribute
6. The attribute will now show on the **Update Member** screen.

Helpful Reminders:

- *Portal 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 for 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.



DELTA DENTAL ONE-TIME ELECTRONIC ELIGIBILITY LOAD

The most accurate and efficient method of capturing initial eligibility is electronically. Delta Dental recommends this process for all of our clients. How does electronic eligibility work? Delta Dental has the capability of accepting and loading your eligibility electronically via spreadsheet. This spreadsheet functions as your initial enrollment file.

If you are interested in streamlining your initial eligibility process by using an electronic load, please use the spreadsheet (next tab). This will allow you to enter enrollment records (one individual per row) using the file layout instructions below.

NOTE: Ignore the hidden columns as this information is not currently required. Please do not change the formatting of this spreadsheet (adding or deleting columns) as this is the required format to process the file.

IMPORTANT: If you encrypt your information prior to sending it to Delta Dental, please provide the password so that your information can be accessed.

ONETIME ELECTRONIC ELIGIBILITY LOAD FILE LAYOUT

Field Description	Length	Valid Value	Requirements
Client ID Number	5	Example: "12345"	
Subclient Number	4	Example: "0001"	
Eligibility Code	1	Y=Active Record T=Term Record	
Effective Date	8	MMDDYYYY	
Subscriber SSN	9		Must be numeric, valid and greater than 000000000. No characters can be used. The subscriber SSN must be filled in for every row.
Relationship Code	2	01=Subscriber 02=Spouse 03=Dependent	Each row of subscribers must be followed by the spouse and dependents before inlcuding the next subscriber. Each individual must be on a different row with all of the below stated information per row including address which may be the same for a family composite.
Date of Birth	8	MMDDYYYY	
Relationship Type	1	A=Active C=Cobra D=Disabled (dependents only) Q=OBRA (Qualified Medical Support Order) R=Retired S=Surviving Spouse T=Student	
First Name	24	John	
Middle Name	24	A	
Last Name	24	Smith	
Address Line 1	30	1234 Mars Lane	
Address Line 2	30	Apt 2	
City	30	okemos	
State Code	2		
ZIP Code	5	48864	
Wait Period Indicator	1	X	This field must be populated with an 'X' if the waiting period is to be waived. Leave blank if there is no waiting period in the contract or if the waiting period should apply.

Billing Reports

For users with access to billing, the user will be able to view consolidated invoices and billing reports by selecting either the Billing Consolidated or Billing Non-Consolidated for the left navigation menu.
Available billing reports include:

Consolidated Invoice – the consolidated invoice summarizes the total amount due for all the sub-clients within a client (aka fund) and allows for one payment to be applied to all sub clients.

Non-consolidated Billing Reports – Billing reports (ex: Claims Detail and Subscriber Listings) provide detailed information at the sub-client level.

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

Subscriber Listings – Reflect all active subscriber enrollment by sub-client for the period of the 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.

To view a Consolidated Invoice:

Step 1: Select Billing – Consolidated form the left navigation menu

Step 2: Enter Client ID and Search

Step 3: Expand the various billing reports folders listed by date range

Step 4: Select the Download button for an Invoice PDF

To view non-consolidated billing reports by sub-client

Step 1: Select Billing – Non-consolidated from the left navigation menu

Step 2: Search for Client ID and select sub-client

Step 3: Specify date range of report

Step 4: Select hyperlink format associated with the list of reports

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

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EMPLOYER SERVICES PORTAL ®

Streamline your benefits management process using the Employer Services Portal!

- Get **real-time** benefit and eligibility information, without a phone call
- Take control of your group's eligibility – view, enter, edit, and terminate member eligibility immediately…no wait time
- Download dentist directories in a printable format
- View your billing details
- Access flexible and convenient reports (if your group qualifies for reports)
- Create Employer Services Portal accounts for your company, maintain security levels for your users, and disable accounts when roles change or the person leaves your company

Control your company's user accounts!

Select a Client Administrator within your company using the form below. This administrator will be able to set up and maintain your Employer Services Portal accounts, enabling immediate access for your users.
NOTE: The Employer Services Portal Administrator must be an employee of the client/group

Client Information		
CLIENT NAME	CLIENT NUMBER	SUBCLIENT NUMBERS

Administrator Information	
NAME	TITLE
EMAIL	PHONE NUMBER

Authorized Signature	
Note: This form must be signed by someone with proper authority within your organization (for example, the Privacy Officer)	
AUTHORIZED SIGNATURE	TITLE
PRINT NAME	DATE

Delta Dental of Minnesota will send your administrator an email with registration information and further instructions. **Please forward your completed form to:**

Email: ClientSuperUser@DeltaDentalMN.org

Need Help? If you have any questions, please contact the Portal Support Team at 1-866-398-9480

Internal

☐ **Authorized** ____

OBLIGATIONS:

Group Administrator acknowledges the confidential nature of Billing, Enrollment or Subscriber Information included in the Employer Services Portal, and that such information includes Protected Health Information ("PHI") as that term is defined by the Health Insurance Portability and Accountability Act of 1996. Group Administrator agrees that it shall:

a) use and disclose the information provided through the Employer Services Portal, including PHI, in compliance with all applicable laws and regulations including but not limited to HIPAA;

b) instruct all employees who have access to Billing or Enrollment Information of the necessity to maintain the confidentiality of such information and to comply with applicable confidentiality laws;

c) ensure that only those individuals who require access to the ESP to administer the plan functions are delegated access to the ESP.

TERMINATION:

This Agreement shall continue in effect until Group Administrator ceases using the Employer Services Portal.

BROKER SERVICES PORTAL

Streamline your benefits management process using the Broker Services Portal!

- Take control of your group's eligibility – view, enter, edit, and cancel member eligibility immediately…no wait time
- Download dentist directories in a printable format
- View client's billing details
- Access flexible and convenient reports (if your group qualifies for reports)
- Create Broker Services Portal accounts for your company, maintain security levels for your users, and disable accounts when roles change or the person leaves your company

Select a Super User within your company using the form below. This Super User will be able to set up and maintain your Broker Services Portal accounts, enabling immediate access for your users.

Please complete the following information to name your agency's Broker Services Portal Super User:

Agency Information	
Agency Name	Agency TIN

Super User Information	
NAME	TITLE
EMAIL	PHONE NUMBER

Licensed Agent Authorization

Note: This form must be signed by the Licensed Agent(s) within your organization to delegate access to the accounts corresponding to the Licensed Agent(s) listed below.

LICENSED AGENT'S NAME	LICENSED AGENT'S SIGNATURE	NPN #	DATE
LICENSED AGENT'S NAME	LICENSED AGENT'S SIGNATURE	NPN #	DATE
LICENSED AGENT'S NAME	LICENSED AGENT'S SIGNATURE	NPN #	DATE
LICENSED AGENT'S NAME	LICENSED AGENT'S SIGNATURE	NPN #	DATE

Delta Dental of Minnesota will send your Super User an email with registration information and further instructions. **Please send completed form to:**

Email:

BrokerSuperUser@DeltaDentalMN.org

If you have any questions, please contact the Portal Support Team at 1-866-398-9480

www.DeltaDentalMN.org

OBLIGATIONS:

Agency Administrator acknowledges the confidential nature of Billing, Enrollment or Subscriber Information included in the Broker Services Portal, and that such information includes Protected Health Information ("PHI") as that term is defined by the Health Insurance Portability and Accountability Act of 1996. Agency Administrator agrees that it shall:

a) use and disclose the information provided through the Broker Services Portal, including PHI, in compliance with all applicable laws and regulations including but not limited to HIPAA;

b) instruct all employees who have access to Billing or Enrollment Information of the necessity to maintain the confidentiality of such information and to comply with applicable confidentiality laws;

c) ensure that only those individuals who require access to the Broker Services Portal to administer the plan functions are delegated access to the Broker Services Portal;

d) utilize the BSP and any PHI in accordance with Agent's Business Associate Agreement with the Plan and Delta Dental of Minnesota.

TERMINATION:

This Agreement shall continue in effect until Agency Administrator ceases using the Broker Services Portal.

Delta Dental of Minnesota

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Suite 2060
Minneapolis, MN 55415

DeltaDentalMN.org

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