Administrator
Web Portal Guide

DIRECT
DENTAL
ADMINISTRATORS, LLC

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Registration and Login

How do I register as an administrator?

Please email **helpdesk@directdentalplans.com** to begin the registration process. You will receive an email to register as the administrator of your group

I received the portal registration email, but I'm having trouble registering.

This may happen as a result of changing the group number that is initially populated for you. For your convenience we've populated the group number needed to register your group with the portal. If you've changed the group number, it may not recognize your credentials. Try again without changing the number that is populated for you and you should be able to register your group.

Can there be more than one administrator login?

Yes! Select **Setup** and then **Portal User Accounts** to create different user roles, create additional user accounts and manage those accounts.

Do I need to register as both a member and administrator separately?

If you are the administrator of a group and also a Direct Dental plan member, you will need to have separate credentials for both the administrator web portal and member web portal.

Do I need to have an email address to register as a member or administrator?

Yes, this is a requirement to register as a group and a user. Email addresses are used to help you find your user name or reset your password in the future if any information is lost or forgotten. If you want to change your email registered with your account, you can do so at any time by accessing the email settings in **Account** > **My Profile**.

I forgot my username and/or password. How can I regain access?

If at any time you forget your username or password, follow the forgot username or password links beneath the login button to assist you in retrieving your credentials. Selecting the **Forgot User Name** link will open a page asking for the administrator's email address used when they registered. A message containing the administrator's user name will be sent to the administrator's email address.

I am locked out of the administrator portal. How can I regain access?

If an incorrect password is entered 3 times, you will be locked out and will need to contact **Portal Support** at **844-275-8758** or email **helpdesk@directdentalplans.com** to reset the password. Please provide the following information when submitting your request:

1. Your name
2. Your group name
3. Your email address

You will receive an email to reset your account and change your password.

How do I update my account information?

Selecting **Account Management** allows you to update their personal information, the password, and the PIN associated with your administrator account.

Eligibility and Enrollment

If you use an eligibility vendor to send 834 EDI files to Direct Dental, then you should not use the portal to make enrollment changes. You should make all enrollment changes in your vendor's system to be sent to us in the weekly EDI file. All changes will be realized in the Direct Dental site after the loading of the next file.

If you do not use an eligibility vendor to send 834 EDI files to Direct Dental, you may use the portal to manage your eligibility if you only offer a dental plan through Direct Dental (and not a vision plan).

If you have both dental and vision plan, and don't have an EDI file feed, you are not able to use the portal for enrollment at this time. You may email an enrollment form securely to **enrollment@directdentalplans.com** or fax the enrollment form to **866-849-2038**.

How do I enroll a member into a dental plan?

If you are using the administrator portal for enrollment and would like to add a new employee, go to **Enrollment** > **Add Subscriber**. You'll be presented with a web form and all required fields will be indicated as you work through it. Once your form is complete, click **Review** to ensure your enrollment summary reflects the records you intend to enter. Once confirmed, click **Add.**

What is the enrollment Qualifying Event?

The **Qualifying Event** is the reason the employee or dependent you are trying to add is eligible to receive benefits:

- New Hire
- Annual Open Enrollment
- Loss of other Health Care Coverage

What is the enrollment Event Date for a New Hire?

The **Event Date** for a New Hire is always the **Date of Hire**.

The system will automatically calculate the effective date for new hires based on the event date using the enrollment rules for your plan.

If you need to make an exception and enroll a member outside of the standard eligibility period rules of your plan, please send the enrollment form to enrollment@directdentalplans.com and we will process your application within two business days.

What is the enrollment Event Date for Annual Open Enrollment?

The **Event Date** for Annual Open Enrollment is always the **date the enrollment paperwork is completed during the open enrollment period** and not the effective date.
The system will automatically calculate the effective date for open enrollment based on the event date using the enrollment rules for your plan.

What is the enrollment Event Date for Loss of Other Health Care Coverage?

The **Event Date** for Loss of other Health Care Coverage is always the **date the other coverage was lost** and not the effective date.

The system will automatically calculate the effective date for open enrollment based on the event date using the enrollment rules for your plan.

Where can I enter an effective date for my enrollee?

Please refer to the questions above (what is the enrollment event date). If you have unique enrollment requirements for any particular member, please send the enrollment form to **enrollment@directdentalplans.com** along with a brief description of your request and we will process your application within two business days.

How do I enroll a member into a dental plan who should be active more than a month ago?

If you attempt to retroactively enroll an employee more than one month prior to the current month, you'll receive a prompt denying your request. This is to ensure accurate billing and that the appropriate debits and credits are accounted for on your next bill.

For these historic records, please send the enrollment form to **enrollment@directdentalplans.com** and we will process your application within two business days.

Terminating enrollees follow the same rules as enrolling. This means that if you need to terminate someone's coverage effective more than 30 days ago, then we request you send an enrollment form or email request to **enrollment@directdentalplans.com**. This is to ensure your monthly billing prior period adjustments are accurate.

How do I enroll a member into a Dental AND a Vision plan?

This question applies only to administrators offering both dental and vision coverage through Direct Dental.

Dual enrollment is not currently supported via the portal. Please submit the enrollment form to **enrollment@directdentalplans.com** and we will process your application within two business days. Dual enrollment is a feature we hope to support in one of the 2016 portal releases.

How do I enroll a dependent?

To enroll a dependent, first make sure the employee has already registered and you've pulled up the employee's Enrollment Summary in **Enrollment** > **Member Search**.

To obtain an employee's Subscriber ID to search, view the enrollment Roster for

Once you have pulled up the Enrollment Summary of the employee in the Member Search, you will see an option at the bottom of the screen to **Add Dependent**.

Click **Add Dependent** and follow the steps to enroll the dependent onto the employee's record. Required fields will be indicated as you work through the web form.

How do I change the product a member is enrolled in?

For members who are changing products (including moving a member from an active product to a COBRA product), please submit the enrollment form to **enrollment@directdentalplans.com** and we will process your application within two business days. "Product change" is not currently supported via the portal; however, it is a feature we hope to support in one of our 2017 portal releases.

Why can't members see all of their dependents in the portal?

In compliance with HIPAA regulations and to protect private health information (PHI), adults will not be able to view other adult dependent's information including spouses and adult children. Only dependents under the age of 18 are viewable via the portal.

For dependent adults to access their information, they will need to register with the portal. To register, they can obtain the Subscriber ID from the policy holder and the dependent will be able to use that to login. The policy holder may obtain their subscriber ID by:

- Registering with the portal and viewing their ID Card or Enrollment Summary;
- Contacting their HR representative who can provide the ID via the Roster Report or from the latest invoice;
- Calling Member Services: **855-844-0626**.

How do my staff members get ID cards and how do they use them?

Members no longer need to present a physical identification card when they see a provider. A provider can verify member eligibility by contacting Provider Services at **855-866-2615**.

If a member would still like an identification card, we've made available the option for members to download their Member ID Card from the Member Web Portal. Members can print at their discretion or they can pull up their information on their smart phone.

Administrators can also access Member ID Cards from the Administrator Portal. Simply pull up the employee's Enrollment Summary in **Enrollment** > **Member Search**. Once you have pulled up the Enrollment Summary of the employee in the Member Search, you will see an option at the bottom of the screen to **Print ID Card**.

How can I view an Enrollment Roster?

Select **Roster** on the navigation bar to view quick all employees who have coverage under the plan. Click the **View** button to open the roster of members. The Group Roster will be populated in a new window that contains group name, group number, employee count, employee name, subscriber ID, benefit plan, effective date, term date, number of dependents, premium type, group name, group number and employee count. This report is in .pdf form so it can be saved and printed. Dependents currently do not show up on this roster.

Administrative Invoices

How do I access my administration invoice information on the portal?

Every month we will be emailing you your administration invoices – the monthly invoices for your employees' participation in the program – as well as posting them to the portal. You can access these invoices under **Invoices**. Invoices are sent from **billing@directdentalplans.com**.

Under **Invoices**, you have two options. Our recommendation is to always first go to the **Invoice Register**.

The Invoice Register provides key high-level information on recent administration invoices, including the billed amounts, prior period adjustments, any paid amounts against the invoice and the balance. If you need additional details, the reference number is a hyperlink that will pull up your itemized invoice and the associated details.

Please see Claim Processing on Page 8 for details on accessing claims and check run invoices.

What is the password to access my emailed administration invoice?

The password to open you invoice is your invoice number which will be located in the body of your email.

Do I need a password to access my administration invoice on the portal?

No. By entering the portal you've already supplied credentials. No further verification is necessary.

Claim Invoices

Where can I see my claims invoice for check runs on the portal?

Claims invoices will be posted to the portal under the **Documents** section on the portal with a document category type of **Other**. You can search for claims invoices without specifying a document type by selecting the default option **All**.

To pull back many documents, try a wide date span going back to at least 9/1/2014 when documents were first being posted to your portal.

What is the password to access my emailed claims invoice?

The password to open you invoice is your invoice number which will be located in the body of your email.

Do I need a password to access my claims invoice on the portal?

No. By entering the portal you've already supplied credentials. No further verification is necessary.

What are the standard claim turnaround times?

We process check runs every other Friday. Our standard timeframe is 30 days maximum from a clean claim receipt. However, if we receive claims with missing information or are otherwise incomplete, processing may take longer. The best way to get paid quickly is to be sure all proper information is submitted the first time.

Miscellaneous Questions

What is a Subscriber ID, what is a Member ID and what's the difference?

A Subscriber ID is the unique identifier your employees and their families will share when they visit the dentist or vision provider. They can also use it to help them register with the portal. As the administrator, you may use the Subscriber ID when conducting a Member Search in the portal.

The **Subscriber ID** is shared by all members of a family and is the first part of the Member ID:

<p align="center"><u>123456789</u> – 01</p>

The **Dependent Code** is the last two digits that follow a Subscriber ID which designate *which* member of the family:

<p align="center">123456789 – <u>01</u></p>

A **Member ID** is the combination of the Subscriber ID and the Dependent code. Each member of a family has their own full Member ID:

<p align="center"><u>123456789 – 01</u></p>

When you are conducting a Member Search or when employees register with the portal, please enter the Subscriber ID only. You may not see results if the full Member ID is supplied.

Please note Subscriber IDs are not social security numbers and have been recreated to no longer contain protected health information.