



BROKER PORTAL USER GUIDE

FEBRUARY 2021

Your Guide to Accessing and Navigating the Broker Portal

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Select a link below to view the instructions

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Looking for additional support on the Broker Portal?

Reach out to your designated Account Manager for further assistance.

Create Your Account

DentaQuest [Broker Portal](#)

CREATE YOUR ACCOUNT

[Sign In](#)

Already have an account? [Sign In](#)

To register, please enter your agency email address in the field below. Upon confirmation, you will receive an email with instructions to complete your registration. Available to every DCPG appointed broker.

Username(Email) *

Register

Username: Your email address will be your username to access the Broker Portal.

Email Verification

YOU'RE ALMOST DONE

Check Your Email

We sent an email to you at
l1ama123234213@mailinator.com

Click on the link in the email. The link will take you to a website page that will allow you to create a secure account.

If you don't see the email in your inbox, check your spam/junk folders. The email may have been delivered there.

DentaQuest[™]

Complete Registration

Hi RACHEL,

It's time to create a password, which is the last step to register for the portal.

Click the button below to get started:

[Complete Registration](#)

If you received this email in error, please ignore. If you need help to complete your registration, please contact us

Thank you,

Customer Support

Please do not reply to this auto-message. You will not receive a response. Please [contact us](#) if you need help.

Secure Your Account

Secure Your Account

Create a password

Password length must be between 8 to 15 characters

Try the password again

Password length must be between 8 to 15 characters Passwords do not match.

Password: Passwords must be at least 10 characters, with a mix of letters, numbers, and special characters (such as '&' or '!'). Passwords must also match.

Security Questions and Answers:
All questions and answers must be different from each other.

Security Questions

Pick 3 questions you can answer if you ever forget your password.

Question 1

Answer to Question 1

Question 2

Answer to Question 2

Question 3

Answer to Question 3

Next

Sign In



SIGN IN

Enter the email and password you created when registered.

Username(Email)*

Password*

Hint: Your password is case sensitive.

SIGN IN

[Forgot Password?](#)

[Need to register? Create an Account](#)

Sign In: Use the email address and password created during registration to sign into the portal.

Forgot Password

DentaQuest

FORGOT PASSWORD

Please verify your identity

Enter Your Username (Email) *

Next

Cancel

Enter Your Username: Enter the email address provided during portal registration.

Forgot Password (cont.)

FORGOT PASSWORD

In what city were you born?

.....

The destination of your first train trip?

.....|

Show Characters

Next

Cancel

Security Question Verification: You have three (3) attempts to answer the security questions setup during registration before being directed to call Customer Service. Passwords will need to be reset by Customer Service.

Forgot Password (cont.)

FORGOT PASSWORD

Please follow these guidelines when creating a new password: At least 8 characters long.
At least 1 lowercase letter. At least 1 uppercase letter. At least 1 number.

New Password *

Confirm Password *

Next

Cancel

New Password:
Password must meet
password requirements.

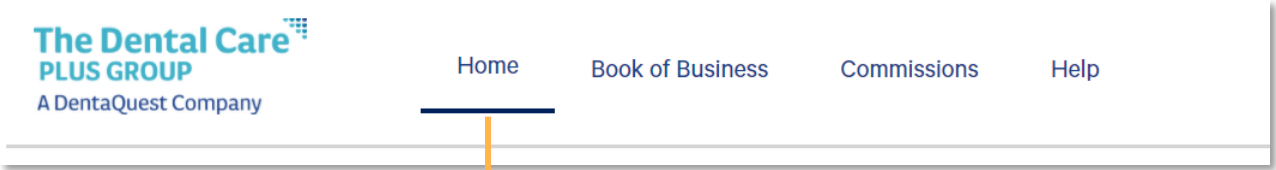
FORGOT PASSWORD

Your password has been successfully reset.

OK

Success: You will be redirected back to the Sign In page after clicking 'OK', where you can enter your email address and new password.

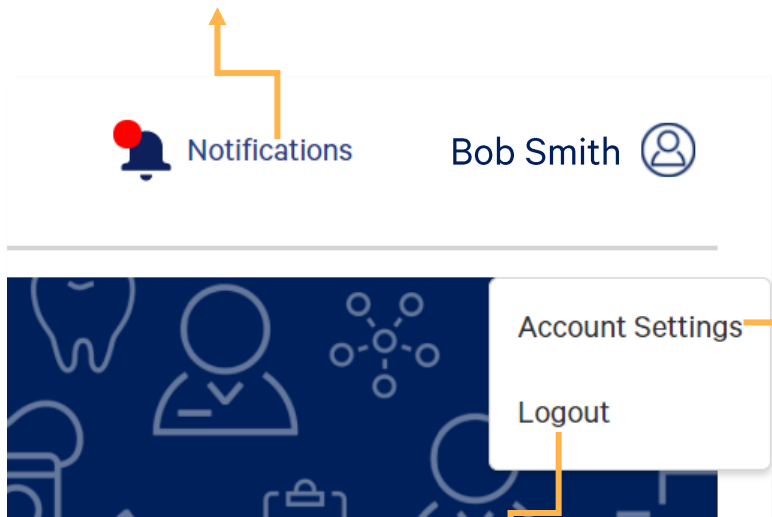
Navigation Overview



Tabbed navigation to quickly switch between portal features.

Tab	Description
Home	Quick access to portal features, view upcoming renewals and access to resource links.
Book of Business	View and manage your groups. See group details and access the Group Admin portal.
Commissions	View and download monthly commission statements.
Help	Access FAQs, contact information for portal and billing help and resource links

Notifications: Access the Notification Center. If you have an unread notification, a red circle will appear on the bell icon.



Account Settings: Access the Account Settings page to update your profile information, update your password or set new security questions.

Logout: Securely log out of the Broker Portal.

Account Settings

Update your name, number, password and security questions. You will need to sign in again when accessing account information.

Password and Security: users must follow the password criteria. Security Questions and Answers must all be different.

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Account Settings

You can update your phone numbers and security settings here. Information that is shaded in grey cannot be changed here.

First Name: *

Last Name: *

Username:

Phone Number:

Email:

New Password:

Confirm New Password:

Security Question 1: What is your father's middle name

Security Answer 1: *

Security Question 2: What is the name of your favorite sports team

Security Answer 2: *

Security Question 3: In what city were you born

Security Answer 3: *

Save Cancel

DentaQuest

About Us
Contact Us
Report Fraud
Privacy Policy
Notice of Privacy Practices

Non-discrimination Notice
Oral Health Resources
Terms of Use

© 2021 DentaQuest Insurance & Health Services

Home Page

Manage & Add Groups: Quick link to the My Groups dashboard to view and manage groups

View Commissions: Quick link to view available commission statements

View Notifications: Quick link to view notifications

Get Help: Quick link to the Help Center to view FAQs, phone numbers and resources

The screenshot shows the top navigation bar with the following items: Home (underlined), Book of Business, Commissions, Help, Notifications (with a bell icon), and Bob Smith (with a user icon). Below the navigation bar is a large blue banner with the text "WELCOME BOB TO THE BROKER PORTAL" and a background of dental-related icons. Below the banner are four dark blue buttons with white icons and text: "Manage & Add Groups" (with a clipboard icon), "View Commissions" (with a magnifying glass over a percentage icon), "View Notifications" (with a bell icon), and "Get Help" (with an information icon). Four orange arrows point from the descriptive text above to these buttons.

Upcoming Renewals

Group Name	Subscribers	Renewal Date
ABCD	25	01/08/2002
ASL Group	0	01/08/2019
BRK Group 1	34	11/19/2020
AZM Group	9	11/23/2020
ABC Group	54	11/23/2020

Upcoming Renewals: View your groups with renewal dates coming up soon. Click on a group name to quickly navigate to see more details about the group

Resources

- [Dental Shelf Rates](#)
- [Product Portfolio](#)
- [Forms & Resources](#)

Resources: Quick links to helpful webpages

My Groups Dashboard

Quickly view and manage your groups from the My Groups Dashboard. Add additional groups to your dashboard.

Search: Enter a Group's name in the Search box to filter the Groups shown in the dashboard

Download the My Groups table into Excel.


Add Groups: Select additional Groups to add to your dashboard

MY GROUPS

Manage your groups, and selected group's effective date, renewal date and number of subscribers. To add and view your groups, click +Add Groups.

Search

Group Name ↓	Subscribers ↓	Effective Date ↓	Renewal Date ↓	
ABCD	25	11/30/2020	01/08/2002	Remove
ASL Group	0	11/04/2020	01/08/2019	Remove
AZM Group	9	11/01/2020	11/23/2020	Remove
BRK Group 1	34		11/19/2020	Remove
ABC Group	54	10/20/2020	11/23/2020	Remove

 +Add Groups

Click on a group's name to view additional details about the group.

If you've already added groups to your dashboard, they will appear in the table.

Clicking [Remove](#) will make the Group no longer visible in your dashboard. If you need to add the group back to your dashboard, click Add Groups.

Add Groups

Add available groups to your My Groups dashboard to easily view group information and access the group's detail page.

Search: Enter a Group's name in the Search box to filter the Groups shown in the dashboard

Available groups which have not yet been added to the My Groups dashboard will be visible in this list.

The screenshot shows a window titled "ADD GROUPS" with a close button (X) in the top right corner. Below the title is the instruction: "Choose one or more groups to manage. Click Update My Groups to refresh your list." There is a search box labeled "Search". Below the search box is a list of groups, each with a checkbox and a label: "Group Name", "PQR Group", and "BRK Group 1". At the bottom of the window are two buttons: "Cancel" and "Update My Groups". Orange arrows point from the text annotations to the search box, the checkboxes, the "Cancel" button, and the "Update My Groups" button.

Click on the checkboxes next to the Group's name to select the group. Clicking on the checkbox in the header will select all groups in the list.

Cancel: Don't save any changes made in the Add Groups window. Any selected groups will not be added to the My Groups dashboard.

Update My Groups: Save any selected groups to the My Groups dashboard.

Group Details

View key information about groups and their associated subgroups.

View important group information including renewal dates, membership counts, etc.

Access the client portal to view and manage the group.

View the group's assigned account manager.

DEF INDUSTRIES

Effective Date : 11/01/2020 Subscribers : 9

Renewal Date : 11/23/2020 Members : 9

Vision Product : Yes Employer Sponsored : No

Subgroups

Product	Plan	Rate	Subscribers	Members
PPO	2500		9	9
	Individual	\$36.00	5	3
	Employee & Spouse	\$36.00	4	6
DHMO	5000		3	5
	Individual	\$44.80	3	5

[Client Portal Login](#)

You need approval to access this portal. Please reach out to the client for authorization.

Account Manager

Bob Smith

Contacts [Add Contact](#)

bew n
new 2
Sandi new
Wandi
Ron

Notes [Add Note](#)

new_er
Test_Help
test_A
testtt_t
Share Regression

View subgroup information including the project type, rate, membership counts, etc.

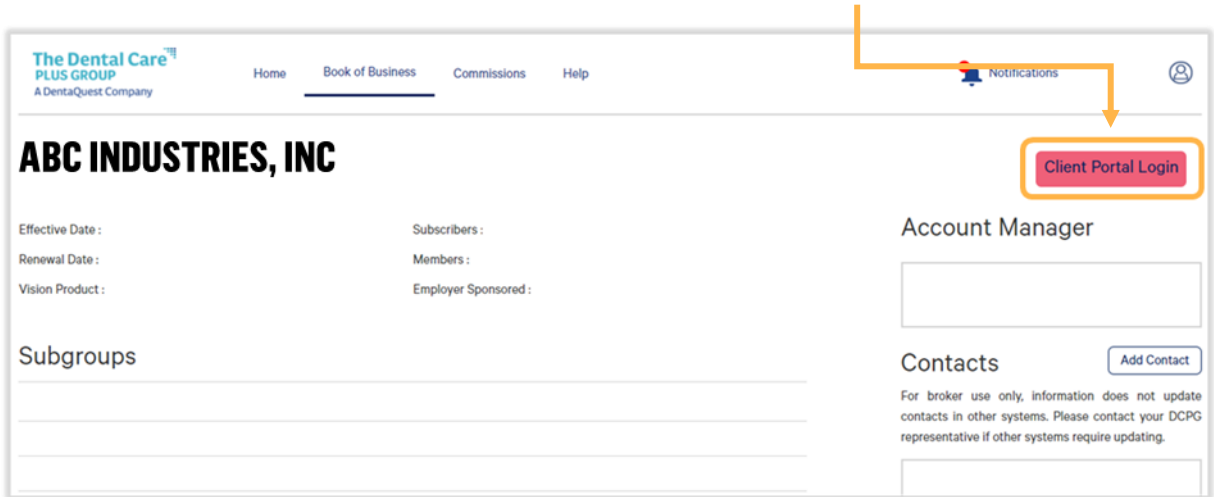
Create and manage contacts for a group. Contacts can also be shared with other broker portal users in your agency.

Create notes for a group. Notes can also be shared with other broker portal users in your agency.

Accessing the Client Portal

The Broker Portal provides you with access to directly login to the Client Portal for any Groups who have granted you access to do so. The Client Portal Login button is easily accessible from the Group’s detail page and will automatically log you into the Client Portal when clicked.

On the Group’s detail page, locate the ‘Client Portal Login’ button in the top-right corner of the page.



Client Portal Login

If the login button appears like this, you have access to login to the Client Portal for this Group. **Click on the Button to login.**

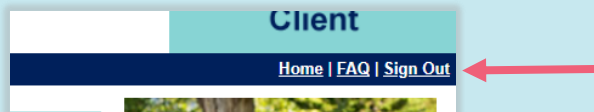
Client Portal Login

Authorized brokers only. Please complete the [Online User Request Form](#) and submit it to your Dental Care Plus Account Manager for authorization.

If the login button appears like this, you do not have access to login to the Client Portal for this Group. **Click on the Online User Request Form in the message below the button to request access.**



IMPORTANT TIP: Once you’ve logged into the Client Portal, you’ll need to click ‘Sign Out’ in the top right corner of the navigation bar if you wish to log into the Client Portal under a different group. If you do not sign out, you may see a 'Session Timed Out' error message when trying to login under another group. Try closing the window, refresh the browser and try again.



Commissions

View and download available monthly commission statements. If you do not see any commission statements in the list, you may not be in a profile that permits you to view your agency's commission statements.

Available commission statements will appear in the list. Commissions can be identified by the Statement Month/Year.

View Statement: Download your monthly commission statement into Excel.

COMMISSIONS

View your most recent Commission statements.

Statement Month	
August 2020	View Statement
July 2020	View Statement
June 2020	View Statement
May 2020	View Statement
April 2020	View Statement

If you don't have commissions available or have not been granted access to view commissions, the below message will display on the Commissions page:

Currently there are no commission statements available to view or you need approval from your agency to access this information.



TIP: The first Commissions that will be available in the new Broker Portal will be for the month of February 2021. Commissions for prior dates will not be visible.

Help Center

Access frequently asked questions, contact information and resource to get answers to your questions or contact us for additional support.

FAQs: View answers to frequently asked questions about Portal Access, Book of Business, Commissions and General Portal Help.

HELP CENTER

FAQs

View answers to frequently asked questions below:



Contact Us

We are here to help. Please contact one of the following for assistance:

General Help

Phone: 513-554-1100
Toll Free: 800-367-9466

Billing & Commissions Help

Email: bcommiss@greatdentalplans.com
Phone: 617-886-1024

Resources

Stay on top of the most recent tools and resources available to you.



Dental Shelf Rates



Product Portfolio



Forms & Resources

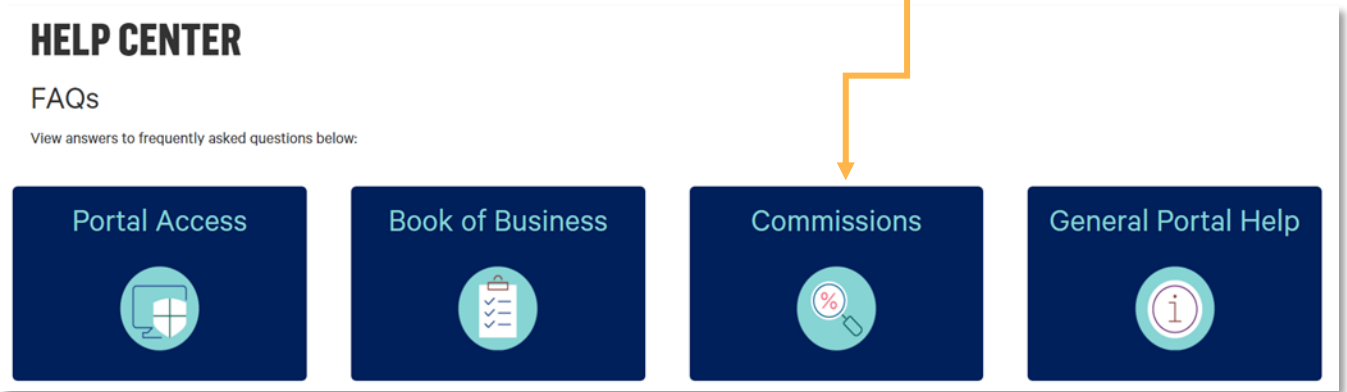
Contact Us: View phone numbers and email address to contact if you need additional support.

Resources: Quick links to helpful webpages

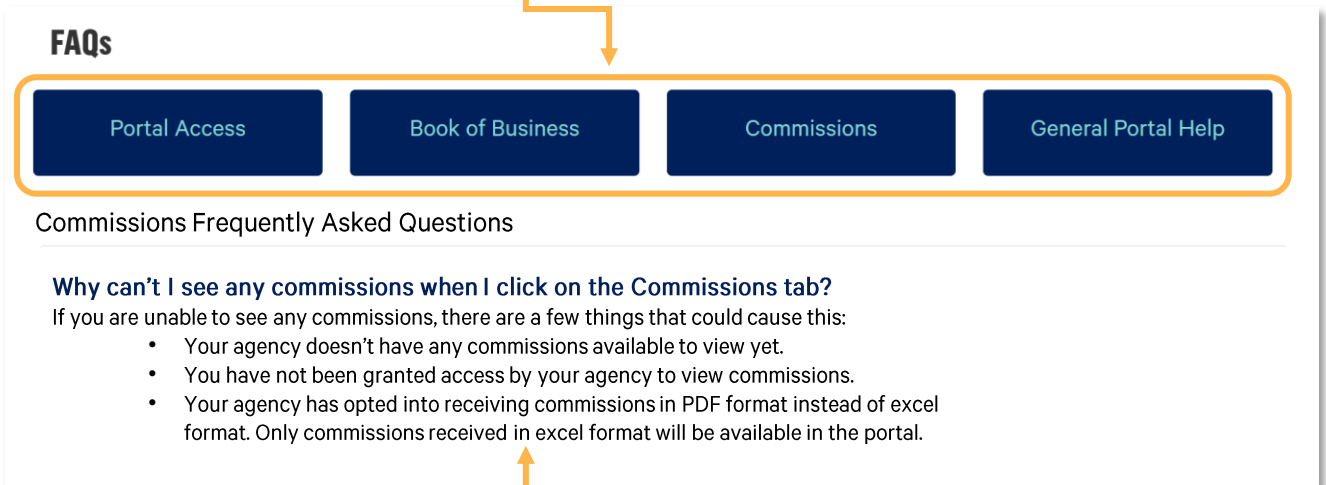
FAQs

View frequently asked questions to access helpful information directly in the portal.

Click on the FAQ you would like to open.



Navigate through the FAQ articles by clicking on the topic buttons



View answers to frequently asked questions.



Notifications

Access important information and updates.

Click on a message to open it and view the full content

NOTIFICATIONS

Available notifications appear below.

Title ↑	Message	Date	Attachment
BN4 Both Agency And Network	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim	12/07/2020, 08:00 PM	
BN4 Both Agency And Network	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim	12/07/2020, 08:00 PM	

Attachment: Messages with attachments will display with a paperclip. Click on the paperclip to download