

BROKER CHECKLIST

Items necessary for customer service inquiries posed to Account Managers, helpful hints & tips.

Our team's goal is always to provide you and your clients the best possible service experience. Supplying the appropriate items listed below not only saves time but assists us in exceeding your service expectations. Thank you for continuing to partner with Dental Care Plus.

✓ For Claim Investigations

- Date of Service
- Employee/Dependent name
- Subscriber ID or SSN
- Provider name and contact information (if available)

✓ For Claims Escalation for Member Reimbursement (out-of-network claims)

- Copy of bill/invoice from provider
- Paid receipt (ASO claims payments)
- Completed Member Reimbursement form (to be found in the member portal resources section of website)
[DCPG: Group Member Portal Resources \(dentalcareplus.com\)](#)
- Claim codes on completed ADA claim form
- Member can mail above info to:
Member Claims Intake
P.O. Box 502
Milwaukee, WI 53201

✓ For Billing Issues

- Full group name and group number
- The billing month in question
- Attachments/copy of the bill helps to expedite turn-around time
- If referring to a specific employee, include employee name and member ID number
- Brief explanation of what error appeared and what the desired outcome should be
- Reminder: Invoices are generated on the 15th of each month, if an enrollment change was not submitted prior to that date the change will appear on the next invoice
- Reminder: audit bills monthly- especially following plan changes/PPO conversions, the farther back changes are needed, the more difficult and time consuming it may be to provide resolution
- Refer to the [DCPG: Employer Portal Resources | Employers | DCPG \(dentalcareplus.com\)](#) for instructions on making and setting up a recurring payment.

✓ Invoicing Cycles

- Invoice cycles occur around the 15th of each month (for the following month) – example: an invoice run on May 15 is generating retro actions prior to June 1 as well as for June premium
 - Once initial enrollment is complete on a new sale, the invoice will catch the next billing cycle and group contact will receive an email notifying them that their invoice has been generated and is available to view. Our system generates invoices on the 15th of every month. If they are receiving this email around the 15th, their first invoice will likely not generate until next month and will be for 2 months of premium.
- Registering for the Group Portal is crucial to viewing and paying the invoice, along with being able to access member details, temp ID cards, and more. After approval, the new group will receive an email from their DCPG Sales Specialist with log in credentials, directive to pay the initial invoice, and information on how to register for the group portal over the next 30 days to set up payments moving forward.
 - EFT set up must first occur after the initial bill is generated.
 - On-going EFT can be established after the initial payment occurs: an initial payment must occur before set up of recurring payments
- Refer to the [DCPG: Employer Portal Resources | Employers | DCPG \(dentalcareplus.com\)](#) for instructions on making and setting up a recurring payment.

✓ For Enrollment Issues (adds/terms, etc.)

- If submitting changes to your dental plan (adds/terms/etc.) via email, please use either of these email addresses:
 - enrollment_questions@dentalcareplus.com
 - enrollment@dentalcareplus.com
- If submitting a new member via the Employer Portal, please refer to page 18 of the Employer Portal User Guide
- If submitting changes to your vision plan (adds/terms/etc.) via email, please send to eliggroup@Avesis.com
- For Assistance with General Enrollment Issues
 - Original request (so we can track accordingly)
 - A copy of the DCP enrollment form or other request form for the specific member
 - Make sure to include the effective date, date of birth, SSN, home address and dependent info
 - Will help to have the subgroup number
- For Assistance with Online Enrollment Issues
 - Confirmation number
 - For technical issues, screen shots or the URL and error message, if available
 - Date of the original request
- Please note groups that are currently supplying enrollment information through a weekly EDI file feed must correct the errors on the file feed, otherwise, manual corrections will be overridden by the next weekly file feed
- Specific step by step instructions on adding a member through the portal are here:
[DCPG: Employer Portal Resources | Employers | DCPG \(dentalcareplus.com\)](#)

✓ New Sales

- Please ensure you have provided DCPG with all required forms: Group Application(s) for Master Group Contract/Policy, Online Account Access Application, Verification of Eligibility Form (VOE) – Signature Required, Employee Enrollment Forms or EDI Spreadsheet, Copy of Quote/Sold Rates and Name of Prior Carrier
- Please note that full group set up will take approximately 2 weeks
 - Note: ID cards will take approximately 3 weeks
 - Employers can print temporary ID cards once signed up for the portal
- **Remember to have your employer groups allow you and/or your agency staff to access their Employer Portal.** This access can be granted by the employer on page 2 of the Group Application.

✓ Misc.

- Refunds for retro-termed group coverage can take 4-6 weeks
- Group change of address requests should be sent to Account Manager (include group number)

Additional resources of information can be found at links below:

[DCPG: Forms and Resources \(dentalcareplus.com\)](#)

[DCPG: Group Member Portal Resources \(dentalcareplus.com\)](#)

[DCPG: Employer Portal Resources | Employers | DCPG \(dentalcareplus.com\)](#)