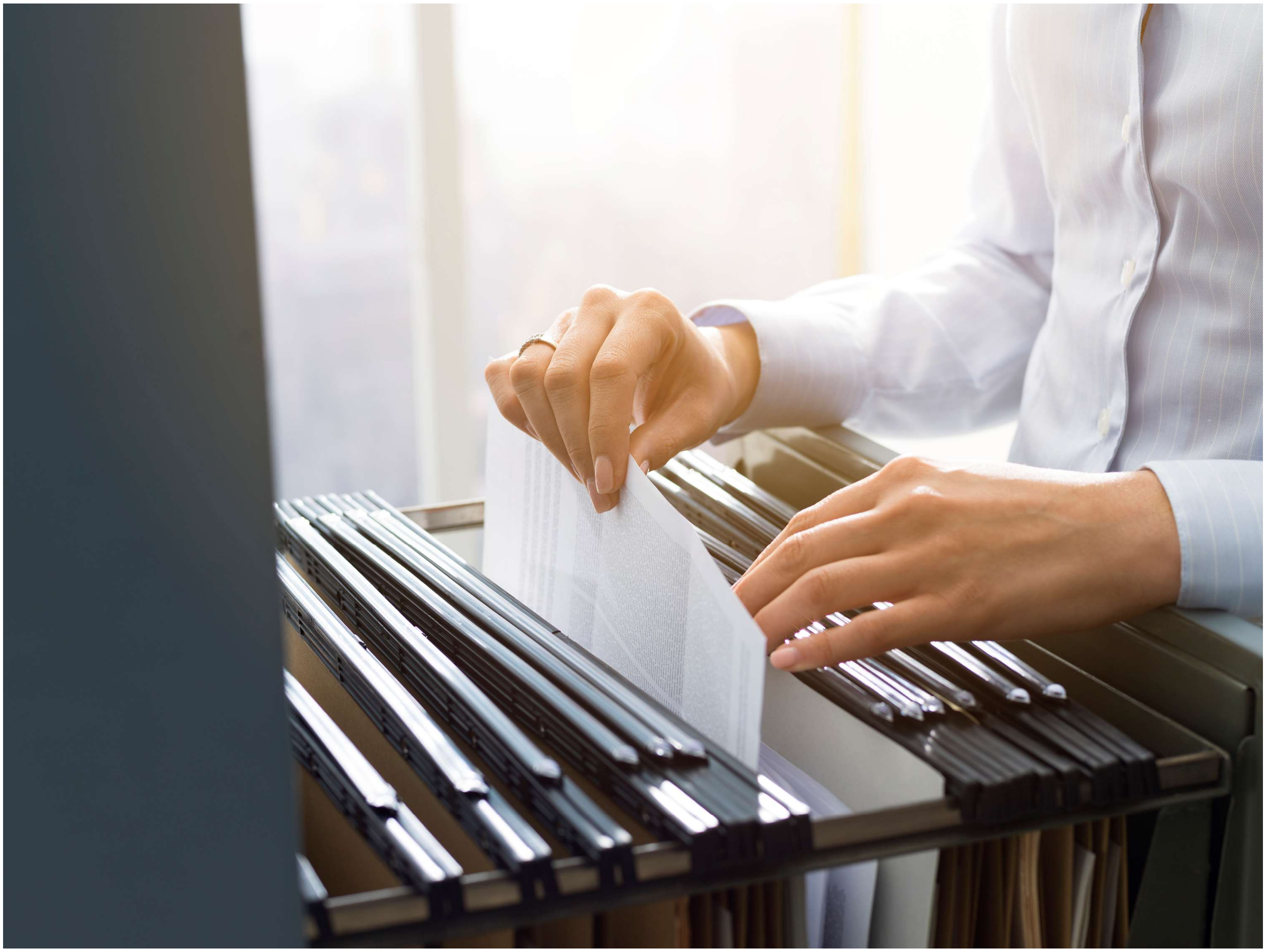
Online Enrollment User Guide

Self-service enrollment and eligibility on the Delta Dental Portal

Online Portal Access Available Daily: Monday – Sunday, 5am to Midnight Pacific Time



What you will find in this document:

- *How to get set up to manage your Enrollment Online*
- *How to perform "Add Enrollments" or "Edit Live Enrollments"*
- *Review Frequently Asked Questions (FAQ)*

Delta Dental of Washington

Contents

Applying for Access

For access to our Online Enrollment tool, you will first need access to a website portal account. An application is required to set up the initial account and to provide access to additional employer or broker users.

Find the form at: Online Enrollment Information

To apply for access, send the completed form to onlineapplications@deltadentalwa.com or fax to: (206)528-2342. *Please note: The application should be signed by the current contract owner or an authorized executive.*

FAQ

How do I start using the tool?

To use the Online Enrollment tool, you will first need to register. An email will be generated during the registration process to complete your registration. A second email will be sent containing the passcode to complete the process.

Don't use another person's email address to access the tool. An Online Enrollment application can be submitted to provide access to new users.

What type of access is available?

There are two options:

- Full access: You can ADD, TERMINATE and CHANGE employees and dependent records.
  Full access is not available for groups that send an electronic eligibility file.
- View access: Allows you to view information only.

Registration & Log In

Employer Users: Once your application has been received and processed, we'll send you two emails to complete the registration process. The first email will contain a link to start the registration and a second email will be sent containing a two-word passcode needed to complete the username and password set up. *Please Note: Our registration links and passcodes expire after 72 hours*.

Producer/Broker Users: Once the Online Application has been received and processed, and your Broker Account has been set up, we'll send you a web access code used for registration. Click on the Producer tab and click sign in, then click Register. Fill out the accompanying form to sign up for your account.

Upon first login, you'll be asked to sign up for your communication preferences. These will allow us to send an email notification monthly when your invoice is ready to be viewed. Once your online account is validated, no further paper invoices are mailed. Invoices are available on the 15th of every month, unless otherwise stated during contract negotiations.

FAQ

How long do I have before my passcode expires?
Emails sent through the secure system will expire after 72 hours. A new passcode is required after this timeframe. Please contact your Delta Dental Contact to send a new passcode.

What if I can't remember my username?

- For Employer Users: Usernames can be recovered by contacting your Delta Dental contact by phone or email, or by calling: 1-800-408-9850 for assistance.
- For Producer/Broker Users: Follow the recover username flow utilizing your web access code at: https://www.deltadentalwa.com/self-service/producer/recover-username, or by emailing producerlicensing@deltadentalwa.com.

How can I reset my password?

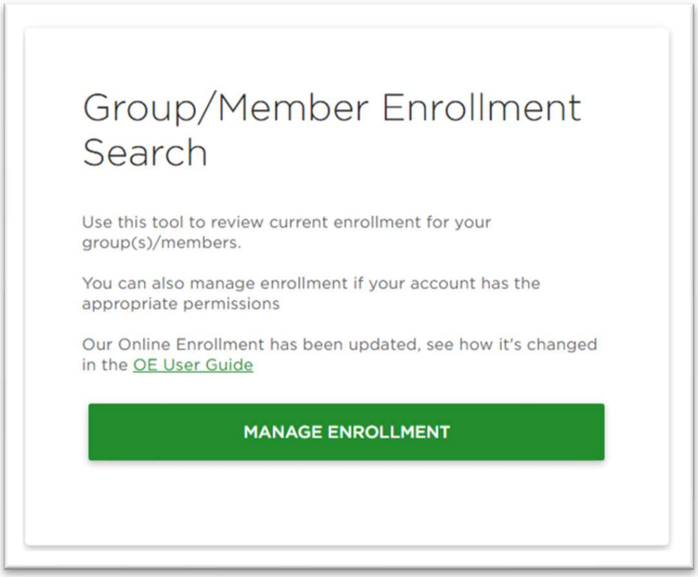
You can reset your password using our password reset feature, found on:
https://www.deltadentalwa.com/self-service/recover-password

Please note: If you haven't received a code sent to your email, you may be using the incorrect username. Please follow the recover username flow first and confirm you are using the correct username.

Your Portal Dashboard

Your dashboard includes your personalized account set up. Different feature cards are available for the features you have access to. Quick links are available to find your most important information. You can find your group's Delta Dental contact in the dashboard (for employer users) or in the Subgroup within your Book of Business (for Producers/Broker users).

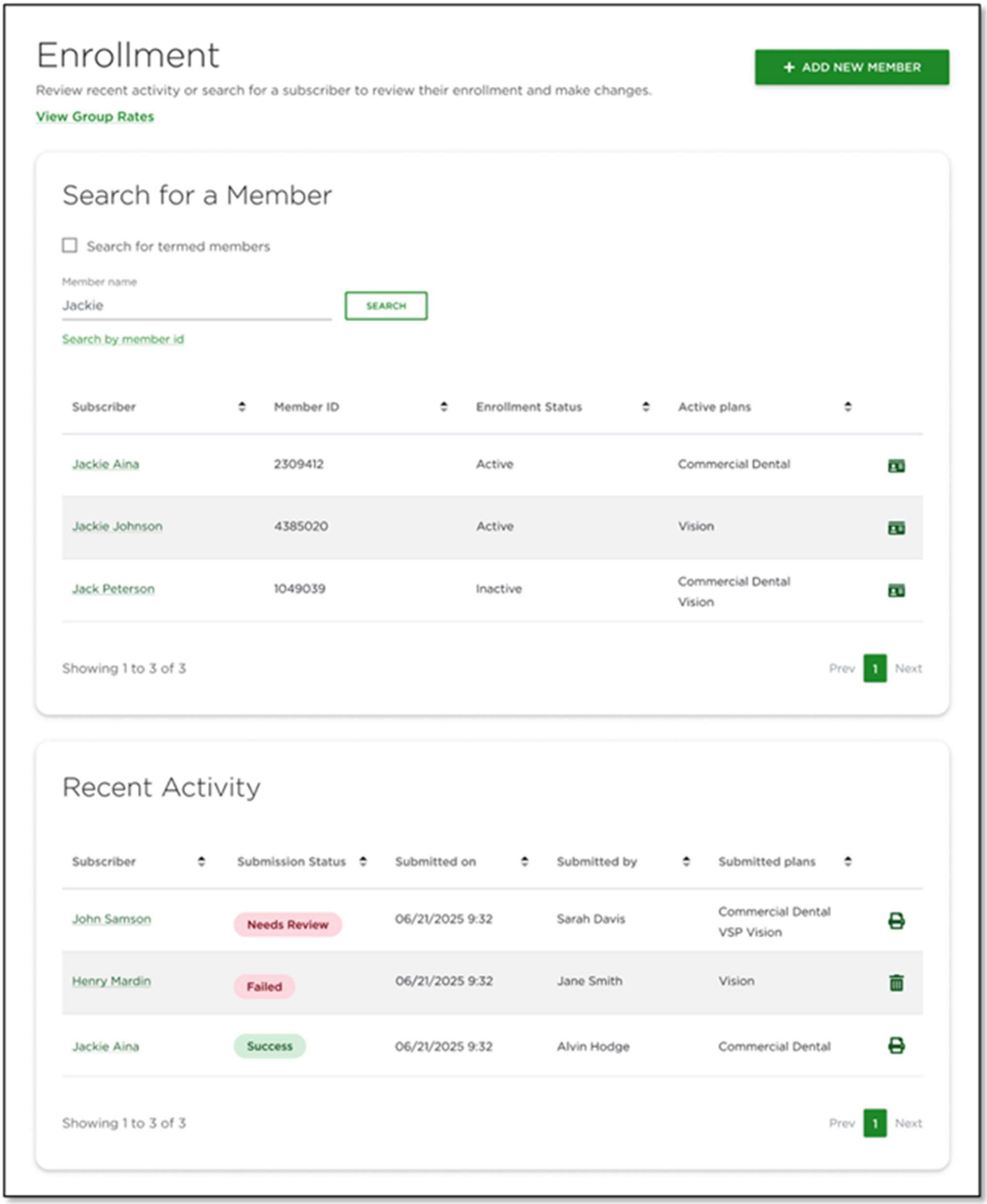
If you have the appropriate access to Online Enrollment, you will see an Online Enrollment card on the dashboard, click the card button to be taken over to the feature which allows you to view group rates, search for member's live enrollment cards, add a new member (with full permissions), and view your recently submitted additions or changes.



Online Enrollment Dashboard

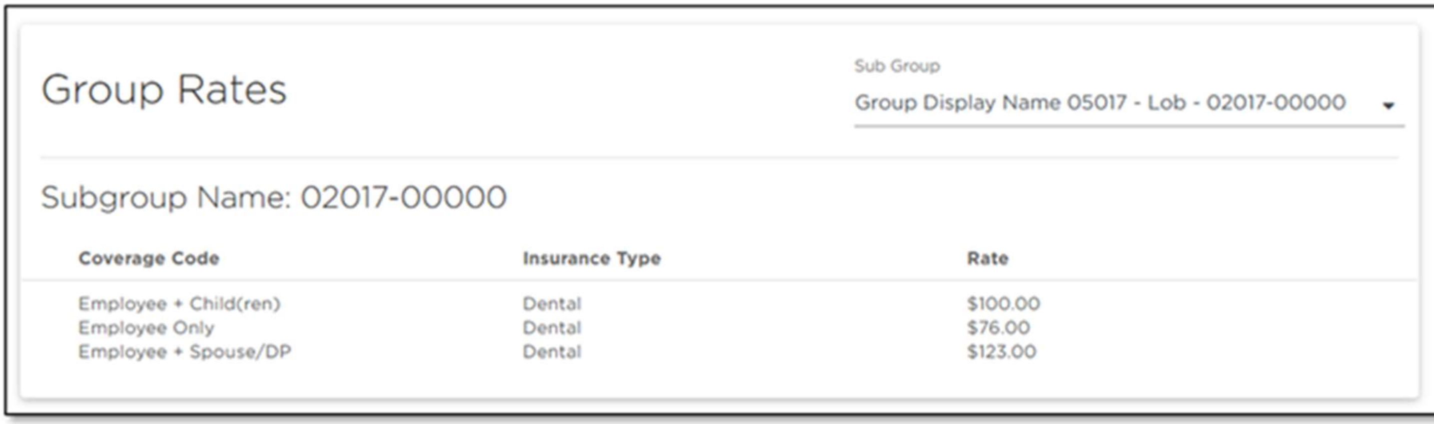
From our dashboard view, you can:

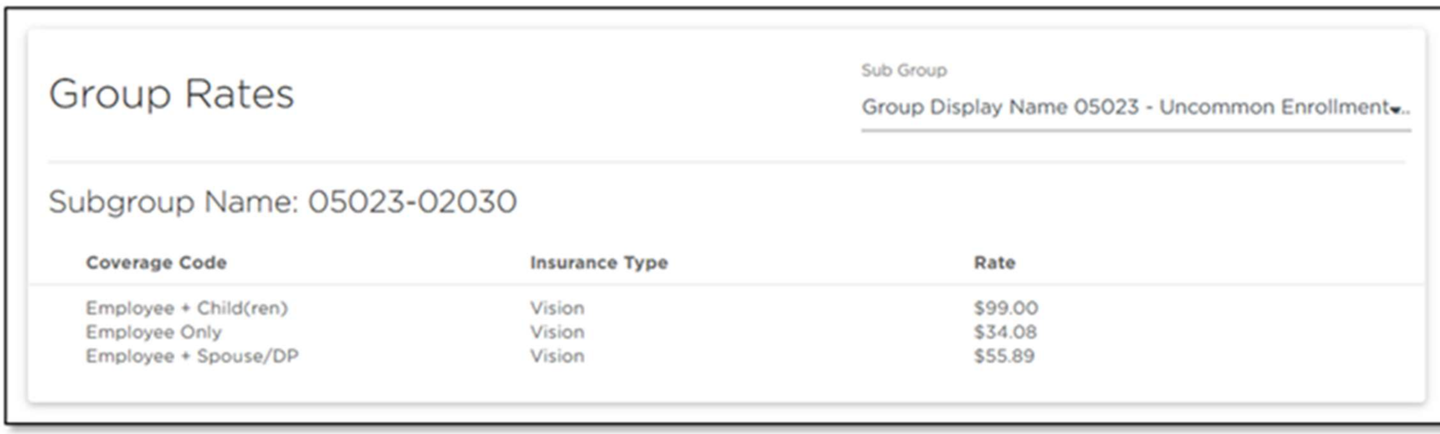
- Review Group Rates (Employer Only)
- Search for a Live Member Record or Termed Record
- View Recent Activity / Recent Transactions

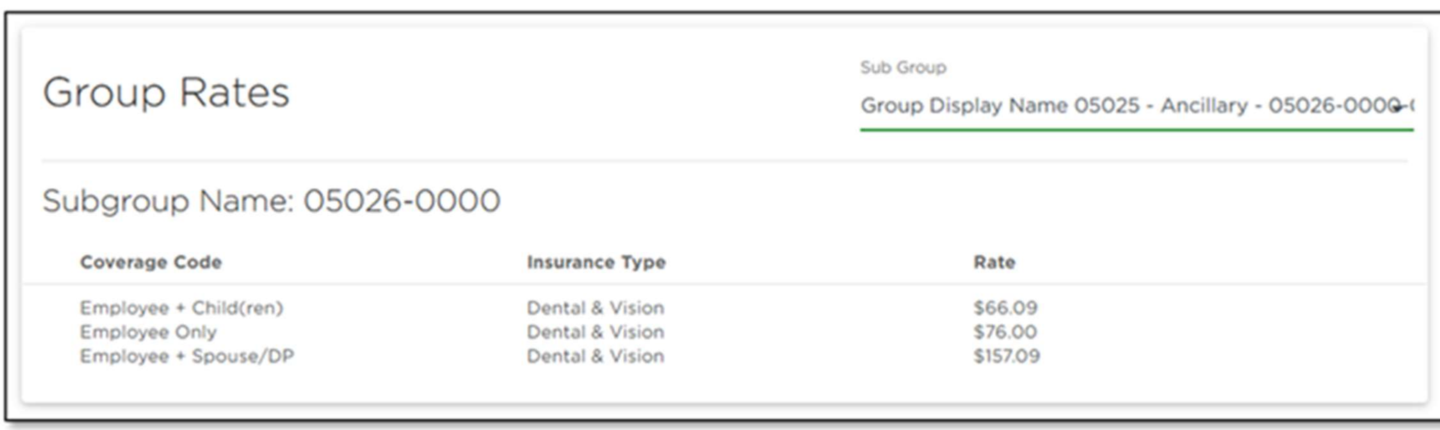

Enrollment
+ ADD NEW MEMBER
Review recent activity or search for a subscriber to review their enrollment and make changes.
View Group Rates
Search for a Member
Search for termed members
Member name
Jackie
SEARCH
Search by member id
Subscriber
Member ID
Enrollment Status
Active plans
Jackie Aina
2309412
Active
Commercial Dental
Jackie Johnson
4385020
Active
Vision
Jack Peterson
1049039
Inactive
Commercial Dental
Vision
Showing 1 to 3 of 3
Prev
1
Next
Recent Activity
Subscriber
Submission Status
Submitted on
Submitted by
Submitted plans
John Samson
Needs Review
06/21/2025 9:32
Sarah Davis
Commercial Dental
VSP Vision
Henry Mardin
Failed
06/21/2025 9:32
Jane Smith
Vision
Jackie Aina
Success
06/21/2025 9:32
Alvin Hodge
Commercial Dental
Showing 1 to 3 of 3
Prev
1
Next

Group Rates

Group Rates allow you to view by coverage codes and dollar amounts by subgroup and line of business.



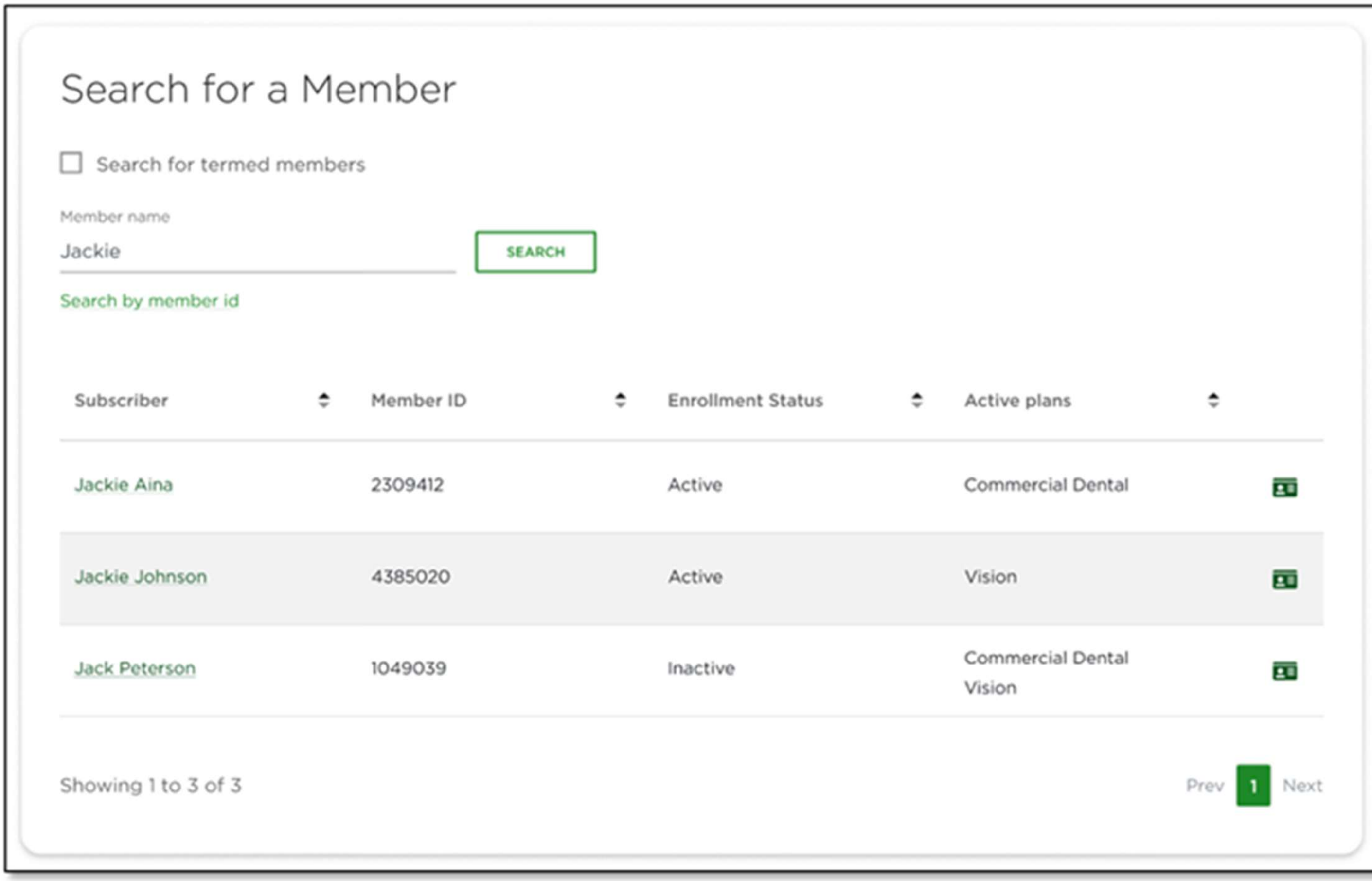




Search for a Member

You can search for a member's live enrollment record by searching Member Name or toggling over to "Search by Member ID" (*note: Search by Member ID may allow you to search by SSN as well*).

The table gives you high level information on the subscriber and allows you to quickly download their ID card(s).

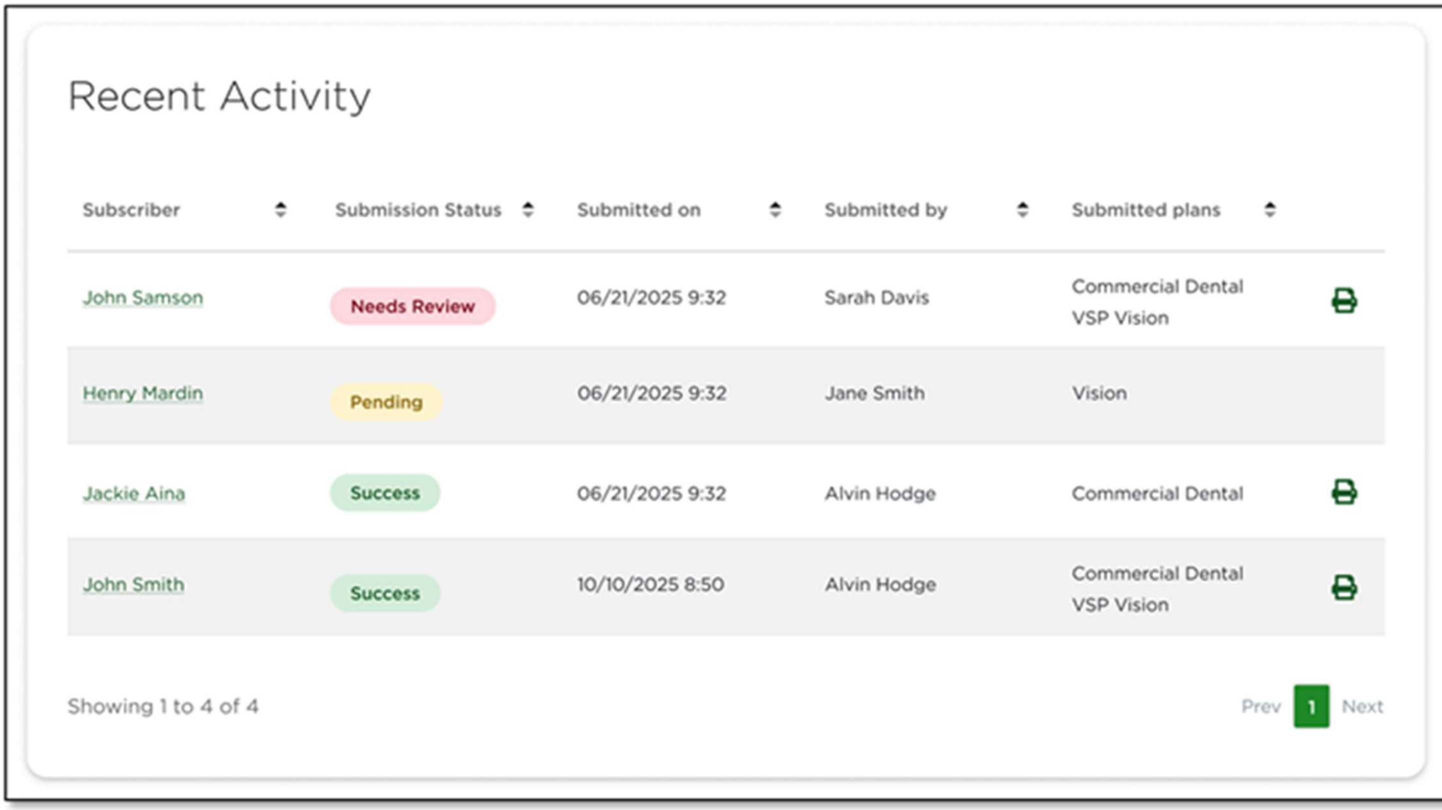


Recent Activity (see also: View Previous Submissions)

The recent activity allows you to see any recently submitted transactions for the groups you have access to. It provides high level details about the member's transaction as well as the status of the transaction; needs review/partial success, failed, success, or partial success.

The table also allows you to download a print view of the confirmed changes (note: you will not have the option to print on any pending or failed transactions). The print will work for either printing successful or partially successful (needs review) transactions.

Failed transactions will allow you to "Discard" which removes that transaction from the table. Ensure you only do this once you know you won't need the record any longer. Failed additions will allow you to edit the record and resubmit – however, editing a record will require you to move back to the live enrollment card to correct any issues with a new transaction.



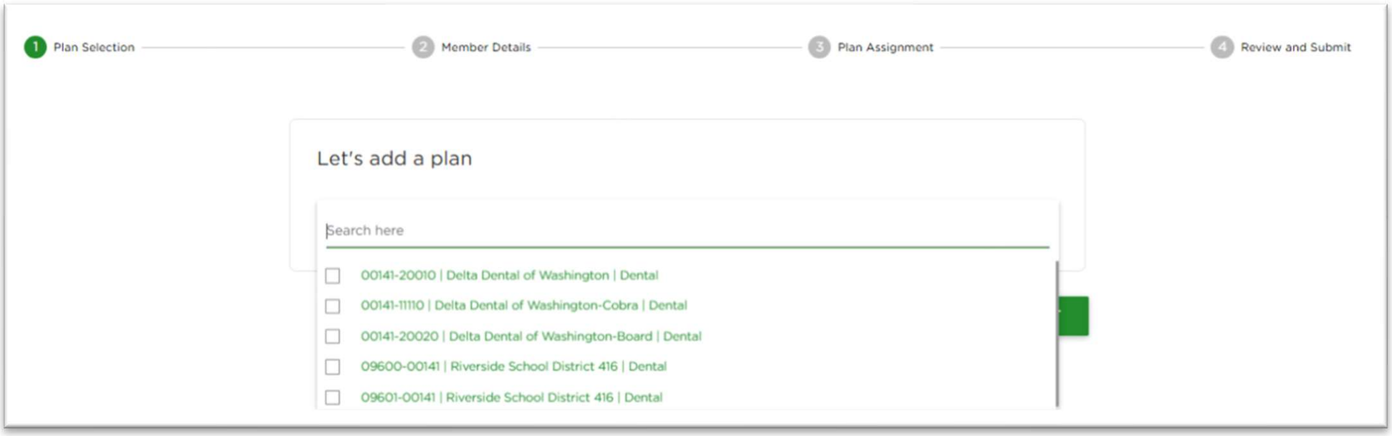
Adding a New Member

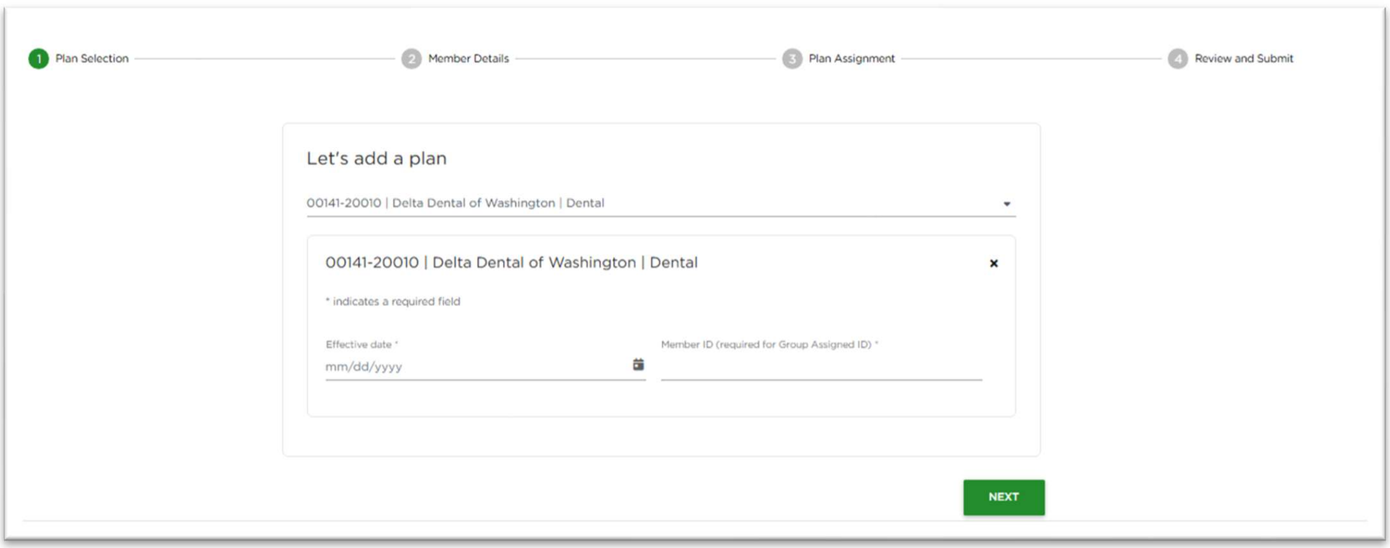
The adding a member flow has been updated to a stepped process:

1. Add Plans: Now you can add more than one plan to the member's record at once and assign the effective date.
2. Add Members: You can enter the subscriber and all dependents in this step.
3. Plan Assignment: This step allows you to edit which members will be enrolled in each plan.
4. Review & Submit: Review the information or go back and edit prior to submitting.

Step 1

Use the search function to find the group(s) you want to add to the member's enrollment record. After selecting the plans, tab out to view the plan cards. Update the plan cards with the effective date and any additional information required for the plan details.





Step 2

Enter in the required subscriber details that have an asterisk and add dependents as needed. A note will display to let you know how many dependents are allowed on the plan(s). Update the dependent addresses separately by unselecting the checkbox “Use subscriber address”. Use the remove button to remove any dependents.

1 Plan Selection — 2 Member Details — 3 Plan Assignment — 4 Review and Submit

Member Details

* indicates a required field

First name *

Middle name
Optional

Last name *

Gender * — Select Gender

Suffix — Select Suffix

Date of birth * — mm/dd/yyyy

Email
Optional

Address line 1 *

Address line 2
Optional

City *

Dependent details

+ ADD DEPENDENT

This coverage supports a maximum of 50 active dependents.

* indicates a required field

New dependent 1

Relationship * — Relationship

First name *

Middle name

Last name *

Gender * — Select one

Suffix — Select one

Date of birth * — mm/dd/yyyy

Phone number — (___)___-____
Optional

✓ Use Same Address As Subscriber

Remove

PREVIOUS — NEXT

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Step 3

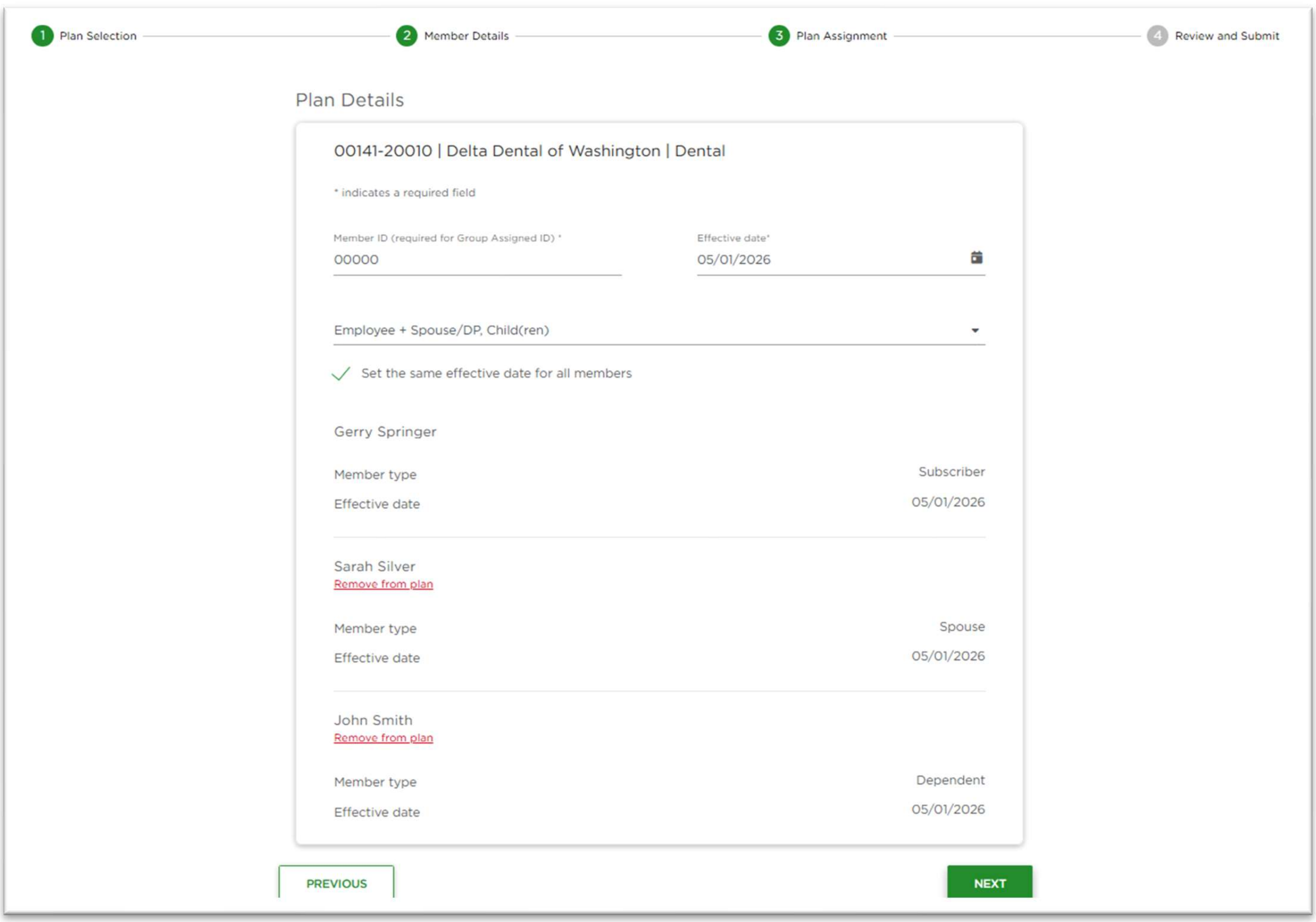
This step allows you to set enrollment per plan, so each plan can have a different enrollment.

Members who are not eligible will display with a tag of "Ineligible". This happens if no corresponding coverage code is allowed for that family member (eg. Vision only allows Employee only, but Dental allows Dental + Family).

Members who are removed from the plan will display a tag of "Not Enrolled" signifying that they will be removed from the enrollment on that particular plan.

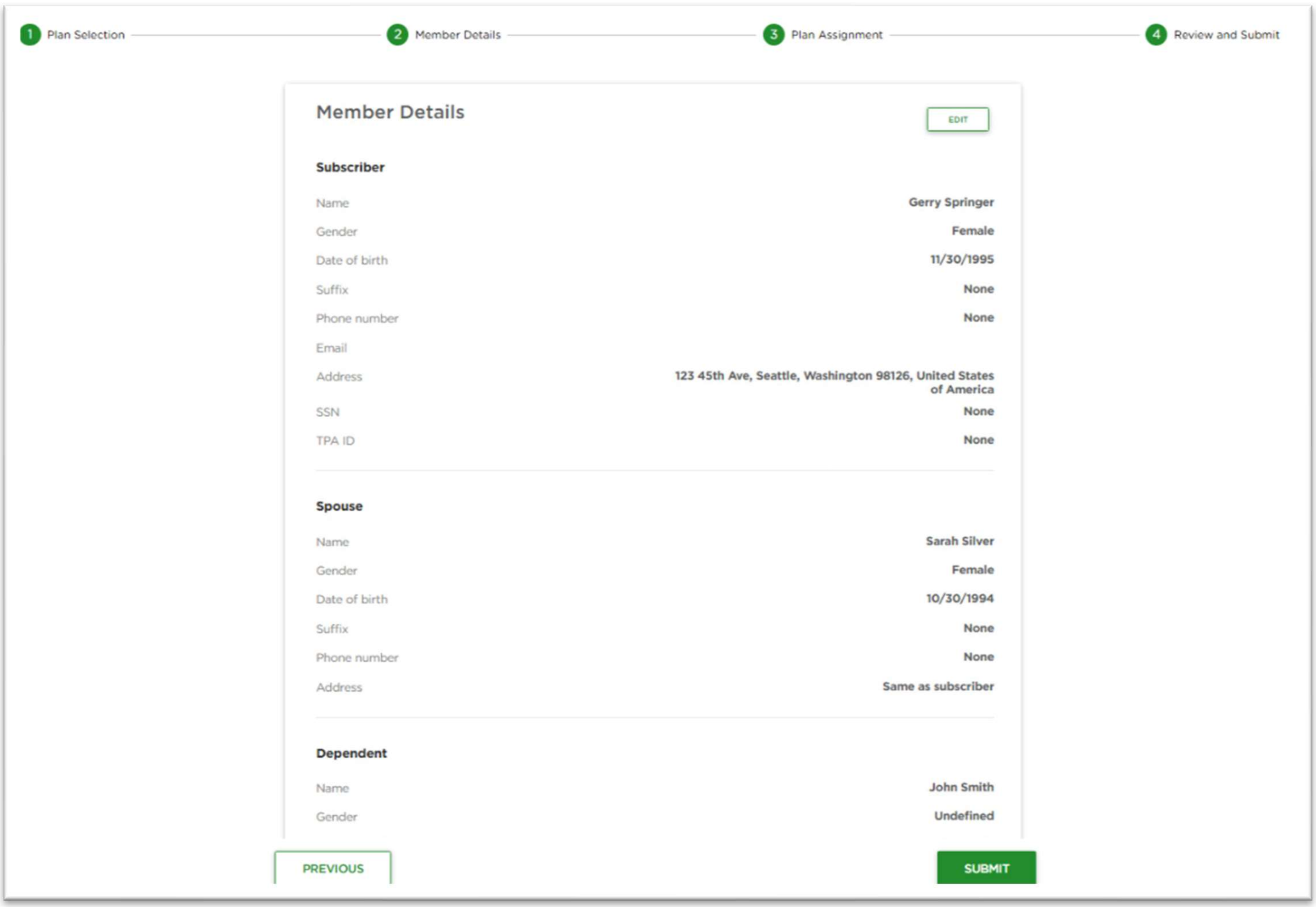
If you want the dependents to have a different effective date, deselect the checkbox "set the same effective date for all members".

The coverage level will auto-populate based on the family composition but may require a selection if multiple coverage codes are applicable or for groups that allow auto-generation.



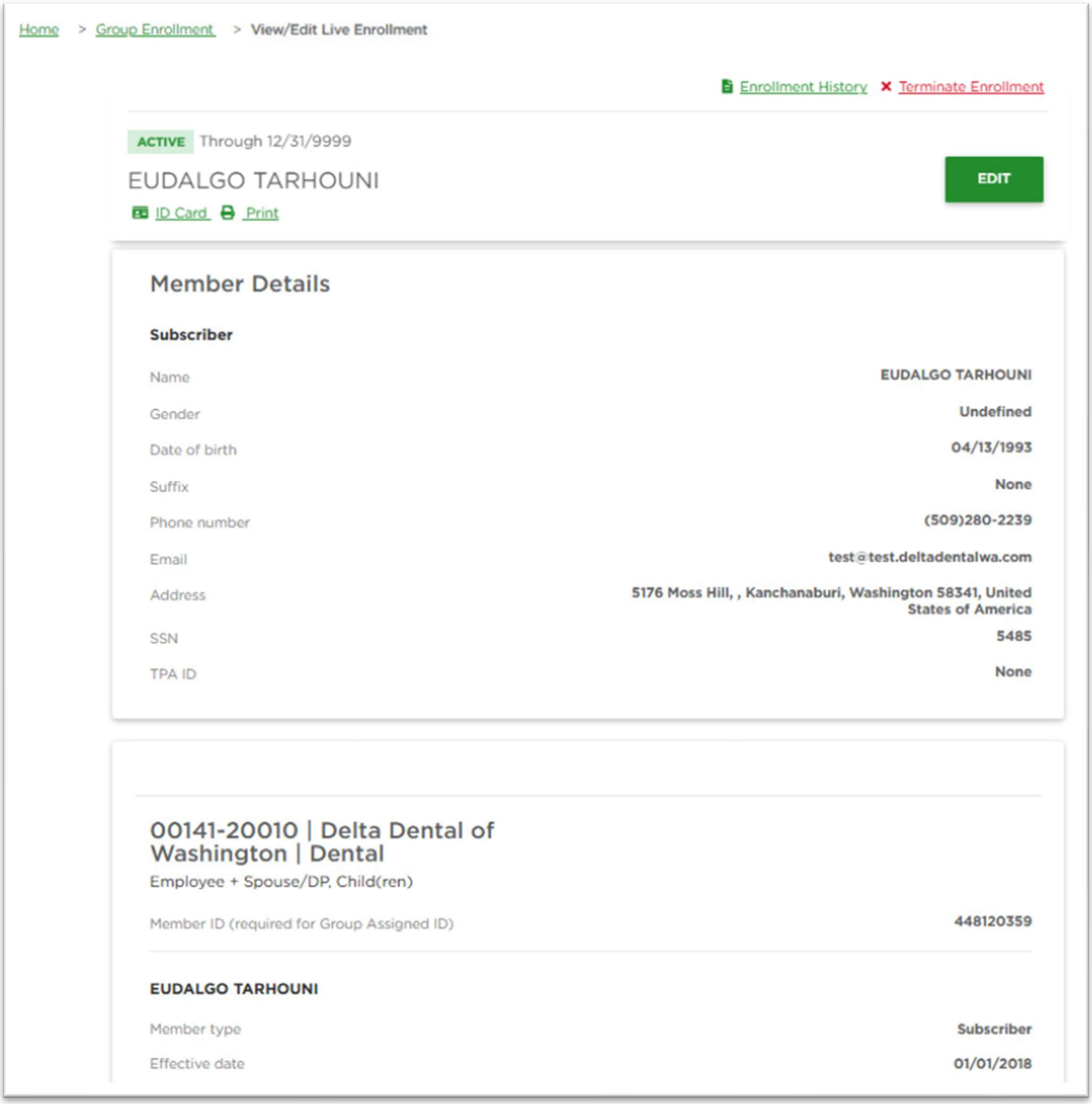
Step 4

Review all the information you have input so far and ensure accuracy. If there are any issues, click the edit buttons to be taken back to step 1 for plan edits and step 2 for member detail edits. Once you have finished reviewing the record, submit and find the enrollment within the recent activity transaction table.



Live Enrollment Card

Using the search functionality or clicking on the live enrollment view from a receipt, you will be able to see the member's live enrollment record. The live enrollment card allows you to see your member's active or terminated status, submitted online enrollment history, download the member's ID card(s), and edit the record.


Home > Group Enrollment > View/Edit Live Enrollment

Enrollment History ✕ Terminate Enrollment

ACTIVE Through 12/31/9999

EUDALGO TARHOUNI

EDIT

ID Card Print

Member Details

Subscriber

Name	EUDALGO TARHOUNI
Gender	Undefined
Date of birth	04/13/1993
Suffix	None
Phone number	(509)280-2239
Email	test@test.deltadentalwa.com
Address	5176 Moss Hill, , Kanchanaburi, Washington 58341, United States of America
SSN	5485
TPA ID	None

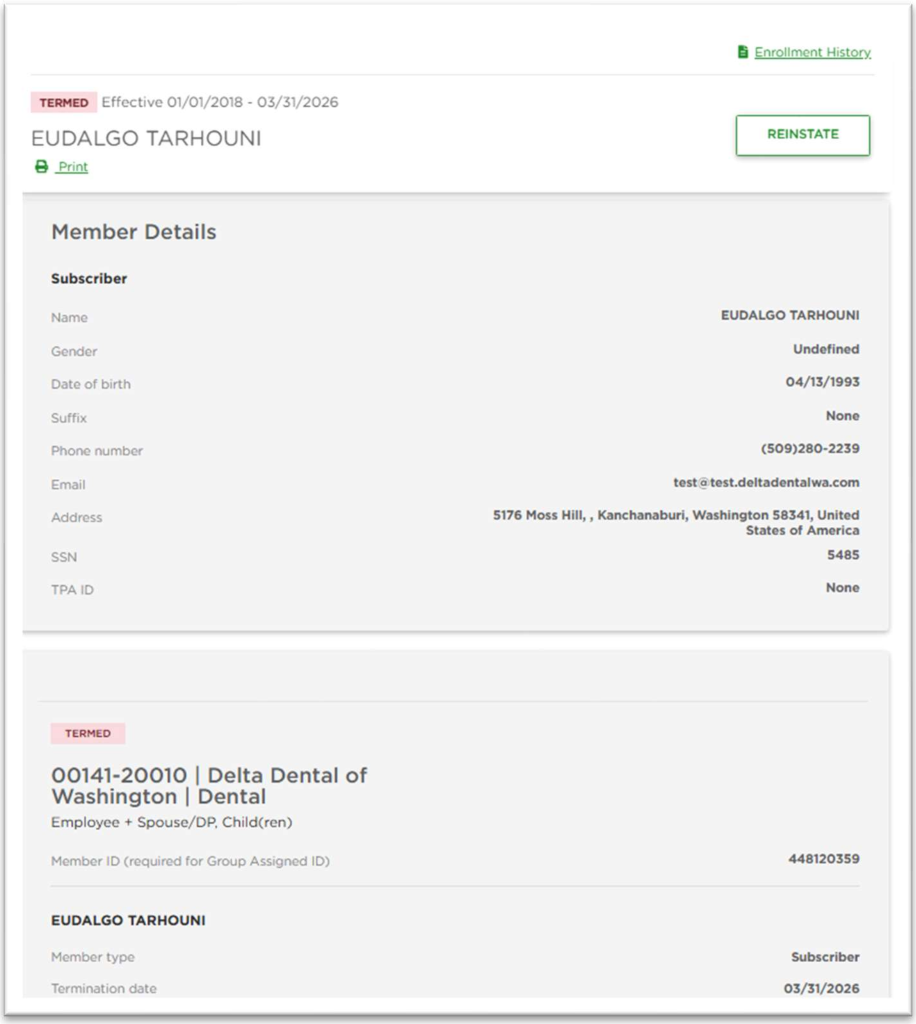
00141-20010 | Delta Dental of Washington | Dental

Employee + Spouse/DP, Child(ren)

Member ID (required for Group Assigned ID)	448120359

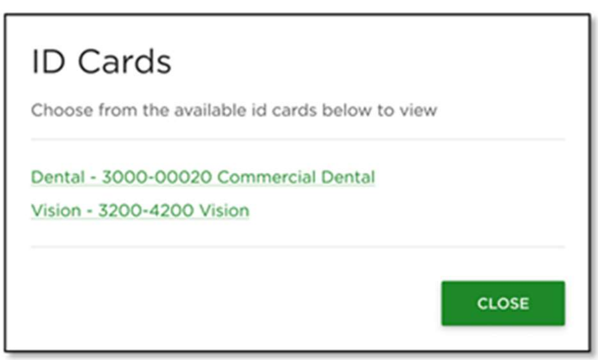
EUDALGO TARHOUNI

Member type	Subscriber
Effective date	01/01/2018



ID Card

If a single ID card exists for the record, once clicking the ID card, the PDF will be downloaded. If multiple ID cards are created for different plans, a box will display and allow you to choose which ID card to download.

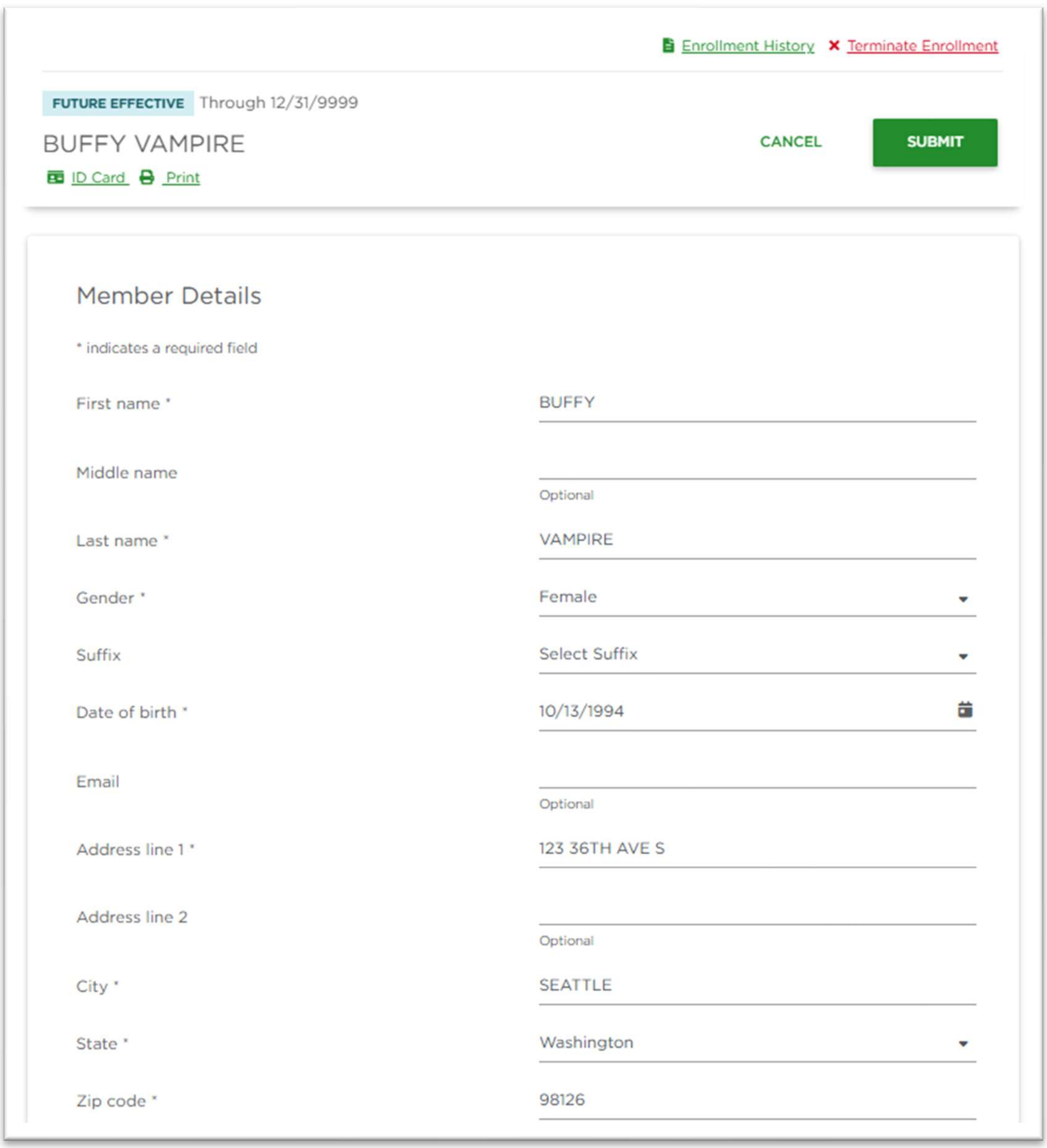


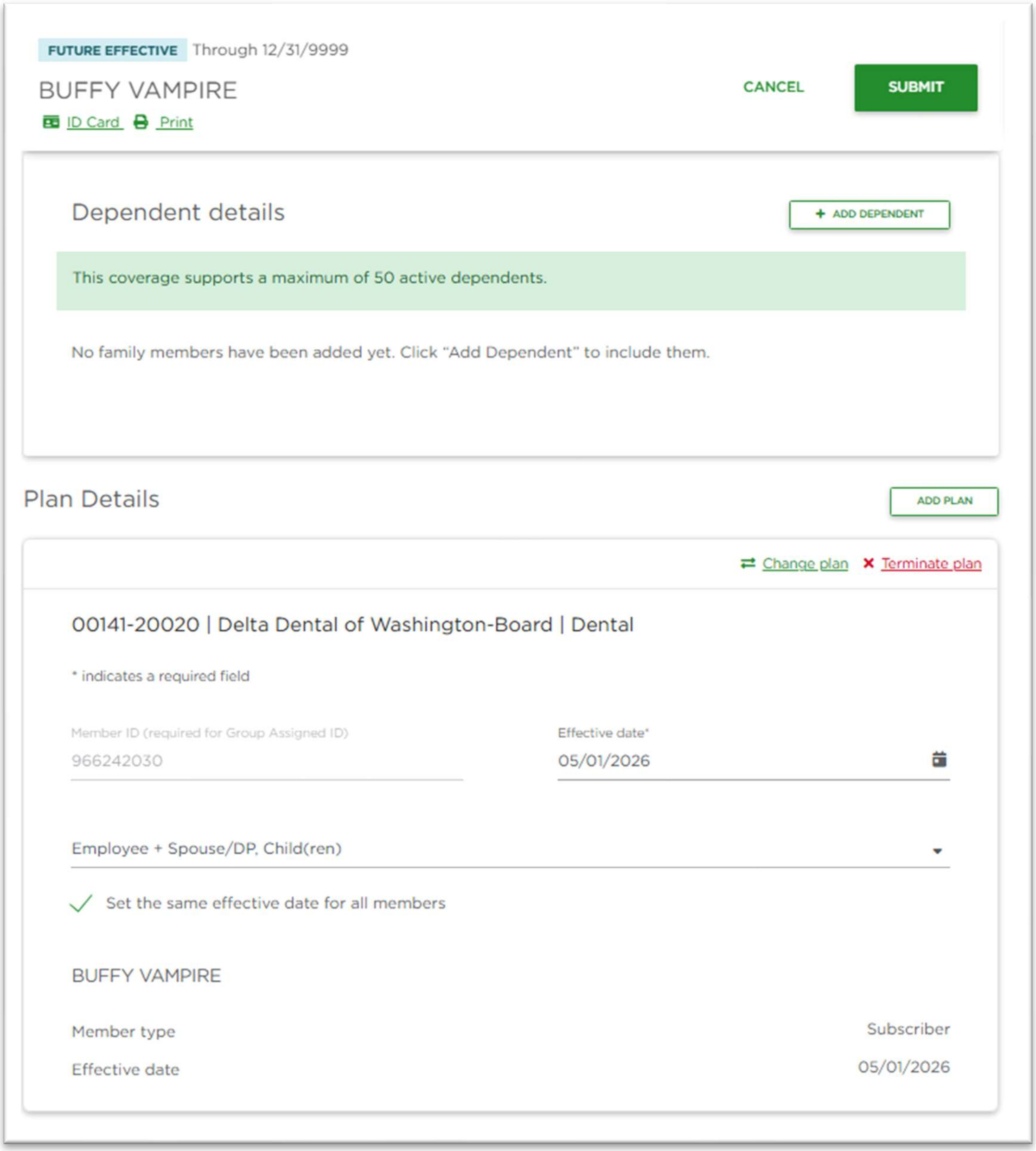
Editing an Existing Record

Upon the edit click, you can make changes to the member details or plan details for the family. You can add a new member to all plans, add a new plan to the family, or change a subgroup of an existing plan. You also have the option to terminate or reinstate at the member level, plan level, or for the entire policy.

Edit Member Details or Add a New Member to a Plan

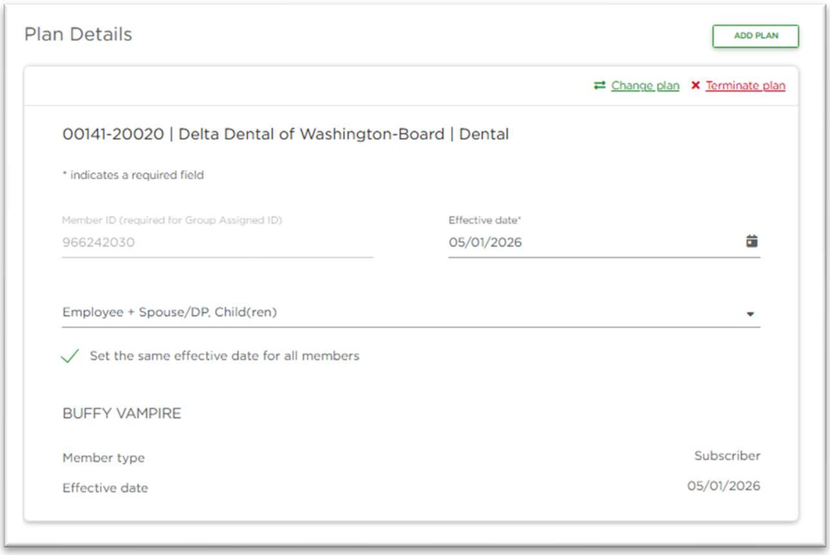
Click the Add Member button to include a new member on all plans associated with that family. A box will display for all of the member information, and then upon save, the individual will display under all active plans. You can then update the user’s effective date or remove them from any plan you don’t want to assign them to.

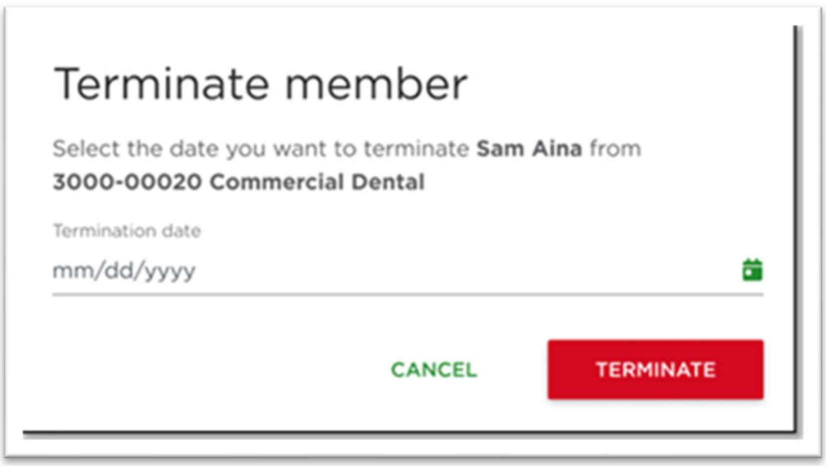




Remove/Terminate a Member from a Plan

You can remove individual members from any plan by terminating their enrollment within that individual plan. Note that member's with multiple plans will need to be terminated from both plans. Upon termination click, you'll need to select the termination date. If you've made a mistake, the system will allow you to cancel the termination or update the termination date. *Please note, for dependent only groups (like cobra groups), the subscriber may be removed from the plan – however – they will be listed as the policy holder of the plan but the termination or removal will mean they are not eligible for benefits.*





Reinstate a Member to a Plan

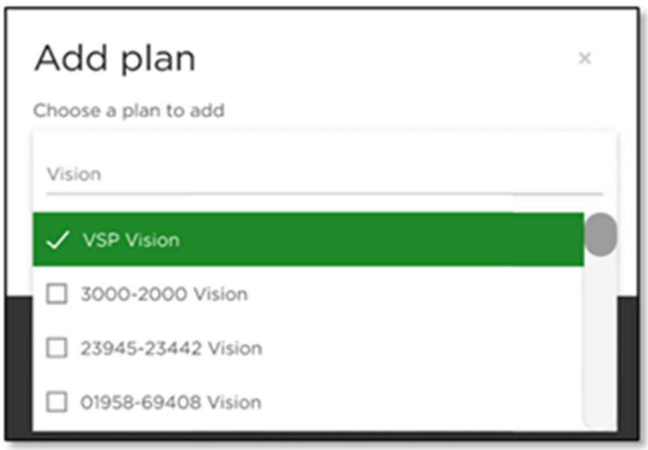
You can reinstate members after a completed termination by clicking the reinstate at either the individual, plan, or policy level. Note that members with multiple plans may need to be reinstated in each plan individually. Upon reinstate click, you'll be asked if the member should have a gap in coverage. If yes, you'll need to enter in a new effective date to start coverage on. If there is no gap in coverage, the member's termination date will be updated to 12/31/9999 to reinstate normal coverage.

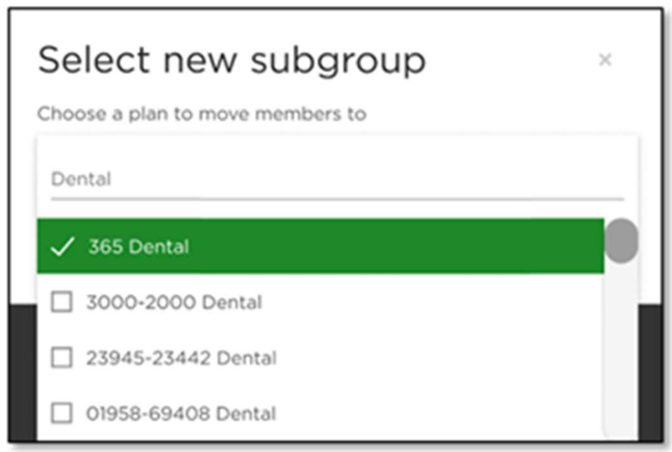
Edit Plan Details

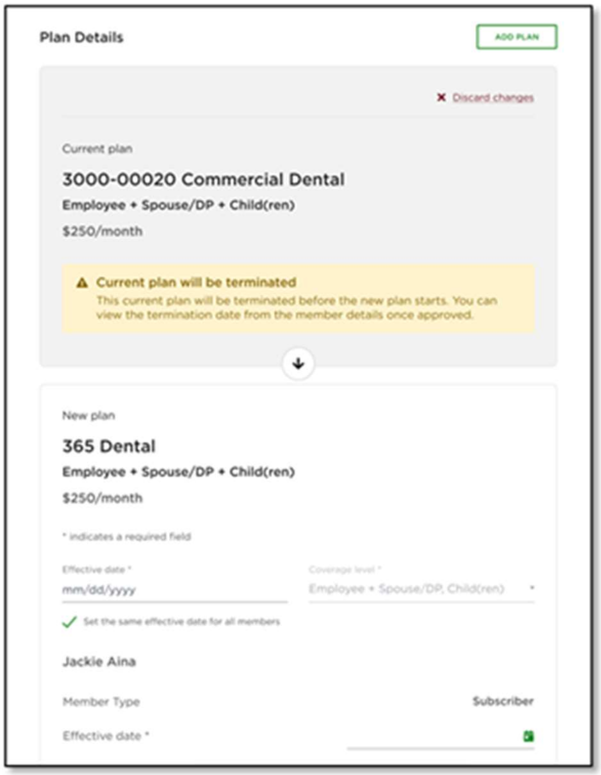
Add or Change a Subgroup

You can now add additional plans to existing member records (example: the user has Dental only but for next year, they are adding Vision). Choose Add Plan to choose the plan from the dropdown. Enter in the plan details, effective date, and submit.

You can also change subgroups by clicking the "Change Subgroup" button and choosing the subgroup the member will be moving to. The User Interface will show what plan will terminate and when the new plan will be effective.



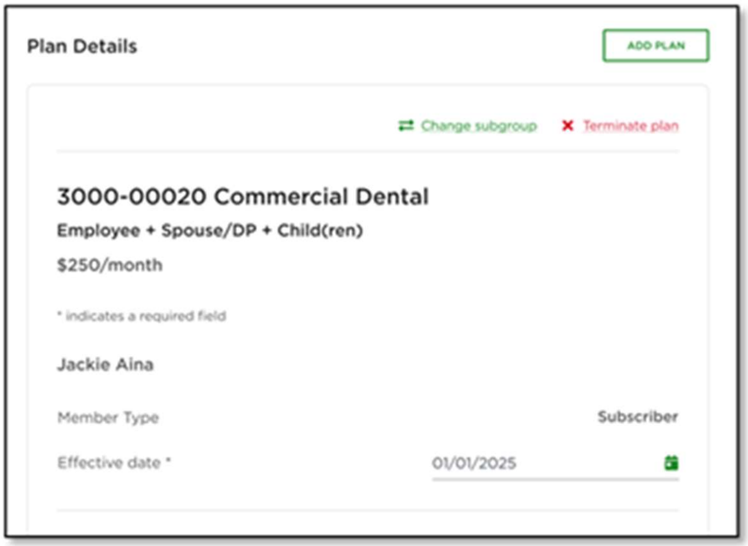


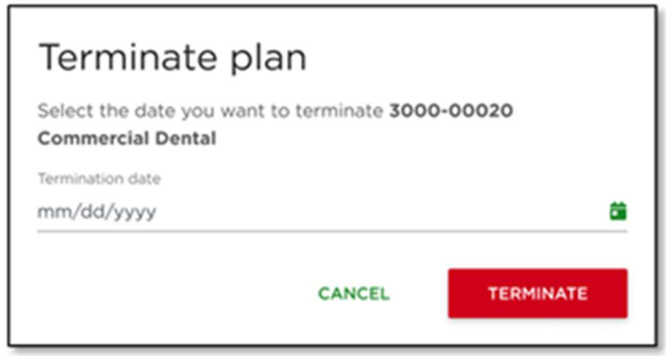


Terminate a Policy or Plan

Terminating a policy or plan is easy from the Live Enrollment Card. Click on Terminate enrollment at the top of the page to terminate all plans and members in the record. Click on Terminate in the Plan Card to terminate an individual plan (if it's the only active plan, it will terminate the entire record).

After clicking on the terminate, a box will pop up to request a termination date to set for the entire family. You can cancel the termination prior to submitting the change if done in error.

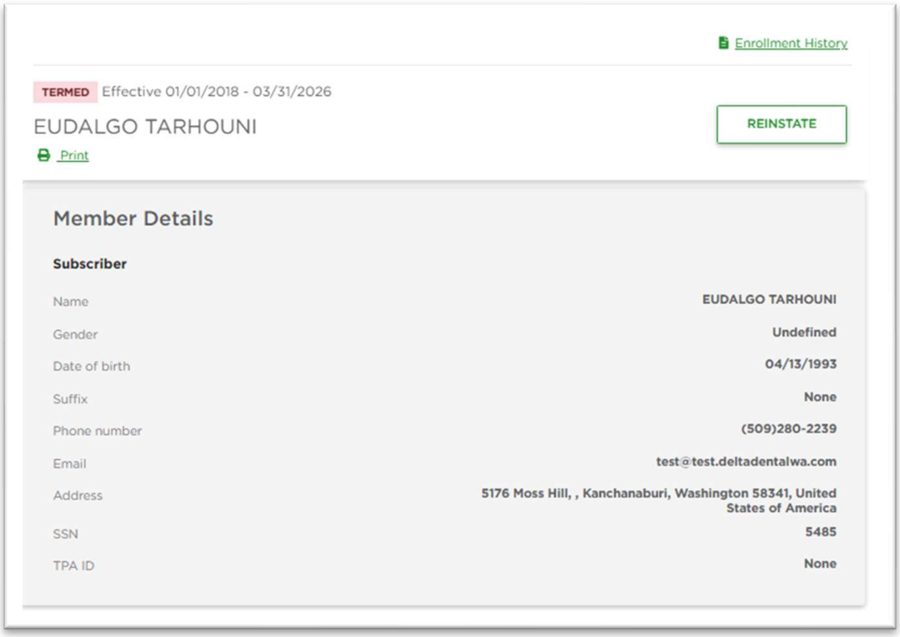


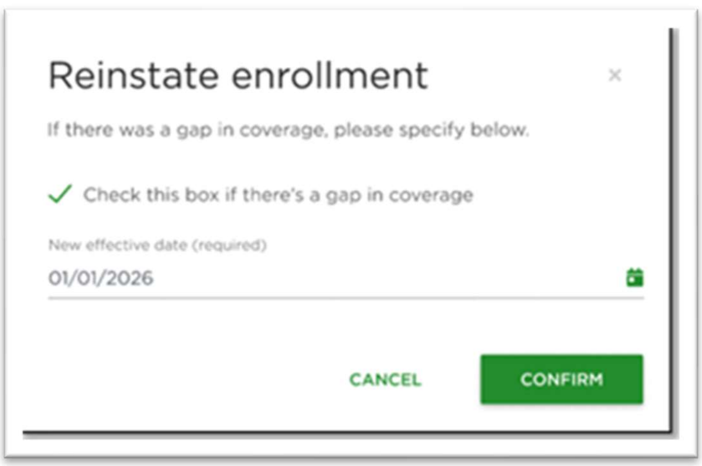


Reinstate a Policy or Plan

Reinstating a policy or plan is easy from the Live/Termed Enrollment Card. Click on Reinstate enrollment at the top of the page to reinstate all plans and members in the record (with the same termination date as the subscriber). Click on Reinstate in the Plan Card to reinstate an individual plan.

After clicking on the reinstate button, a box will pop up to request whether a gap in coverage should exist – if not, the termination date will be updated to ensure the record is changed to active, and if there is a gap in coverage – it will ask for a new effective date to start coverage. When reinstating at the policy or plan level, the reinstate will also work on any family members with the same termination dates. These users can then be removed from the reinstate process by clicking “remove from plan/cancel reinstate.”





View Recent Activity / Previous Submissions

Our Recent Activity table displays a list of previous adds or edits made to a member's enrollment cards. It is important to note that these transactions are just records/receipts of the adds and edits performed. Once an add or edit is completed, the transaction will move into the table as a pending record. From there, the backend system will process the add or edit and each hour an update will be made to any pending records (if processed in that time). The record can live in several states after being processed; failed, successful (completed), or partial success (needs review). See the specific state views in concurrent sections of this document.

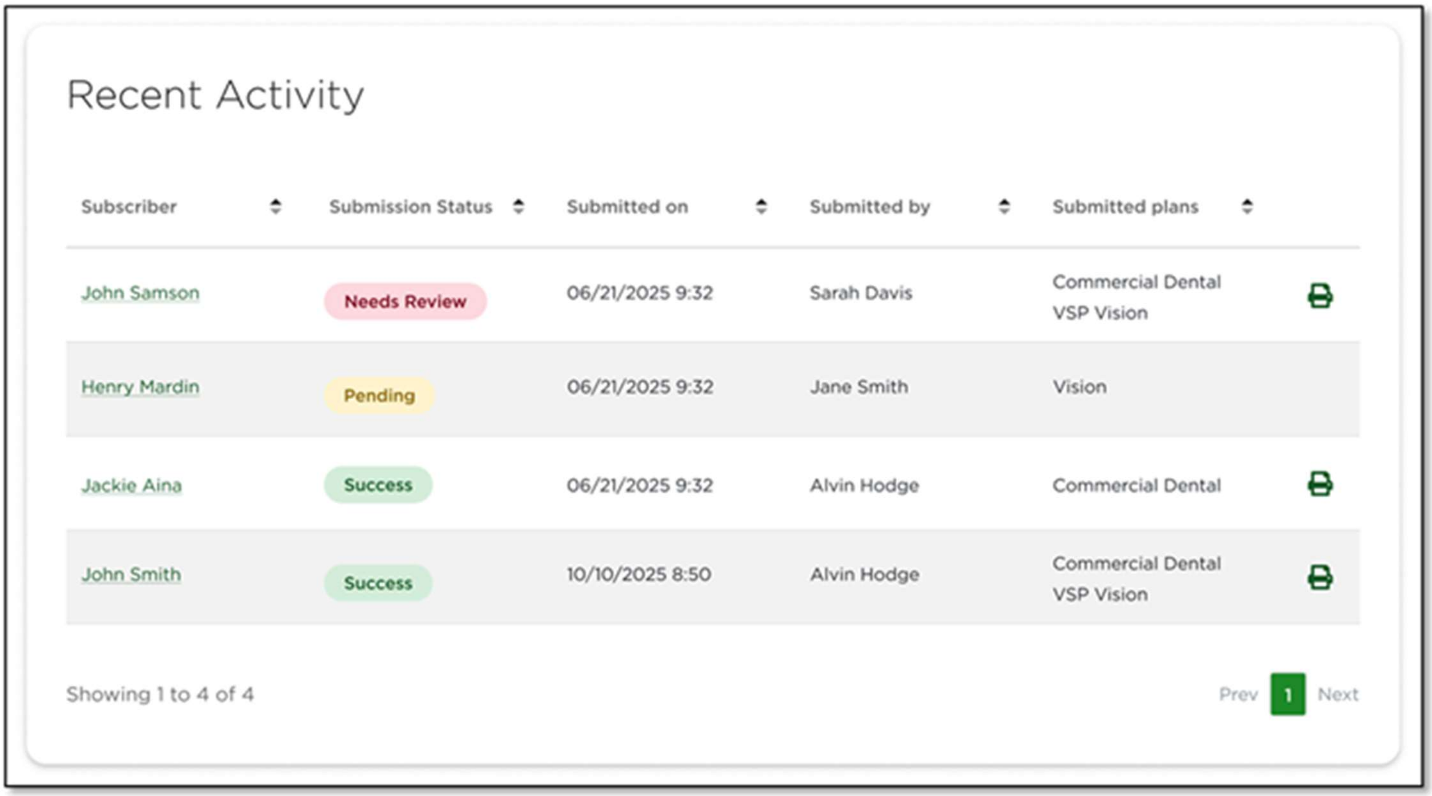
Submission Statuses

Pending = Sent to the backend system, awaiting or actively being processed.

Partial Success/Needs Review = Adds/Changes were received, but some parts of the enrollment were not successful and additional changes may be required.

Success = The transaction was received and processed completely. You can then see the changes in the live enrollment card by clicking “Live Enrollment Card” from the receipt of these transactions.

Failed = The transaction failed entirely and did not add the member or make the change requested, Review these records for specific failure messages.



Recent Activity

Subscriber	Submission Status	Submitted on	Submitted by	Submitted plans
John Samson	Needs Review	06/21/2025 9:32	Sarah Davis	Commercial Dental VSP Vision
Henry Mardin	Pending	06/21/2025 9:32	Jane Smith	Vision
Jackie Aina	Success	06/21/2025 9:32	Alvin Hodge	Commercial Dental
John Smith	Success	10/10/2025 8:50	Alvin Hodge	Commercial Dental VSP Vision

Showing 1 to 4 of 4 Prev 1 Next

Receipt Views

Completed Successfully: This record was completed successfully with no issues. You can now print the confirmation of changes by selecting the print icon in the table. Click to View the Live Enrollment to view the member’s active live enrollment record.

History Print

MAY DAY

Enrollment may have changed ×

This record reflects your submitted enrollment. Updates or corrections may have been made since then. View the live enrollment for the most up-to-date record or to make changes.

View live enrollment

Member Details

Name	**MAY DAY**
Gender	**Female**
Date of birth	**04/15/1978**
Suffix	
Phone number	**(000)000-0000**
Email	
Address	**23109 40TH DR NE, ARLINGTON, Washington 982237677, United States of America**
Country	**United States of America**
SSN	**1334**
TPA ID	**None**

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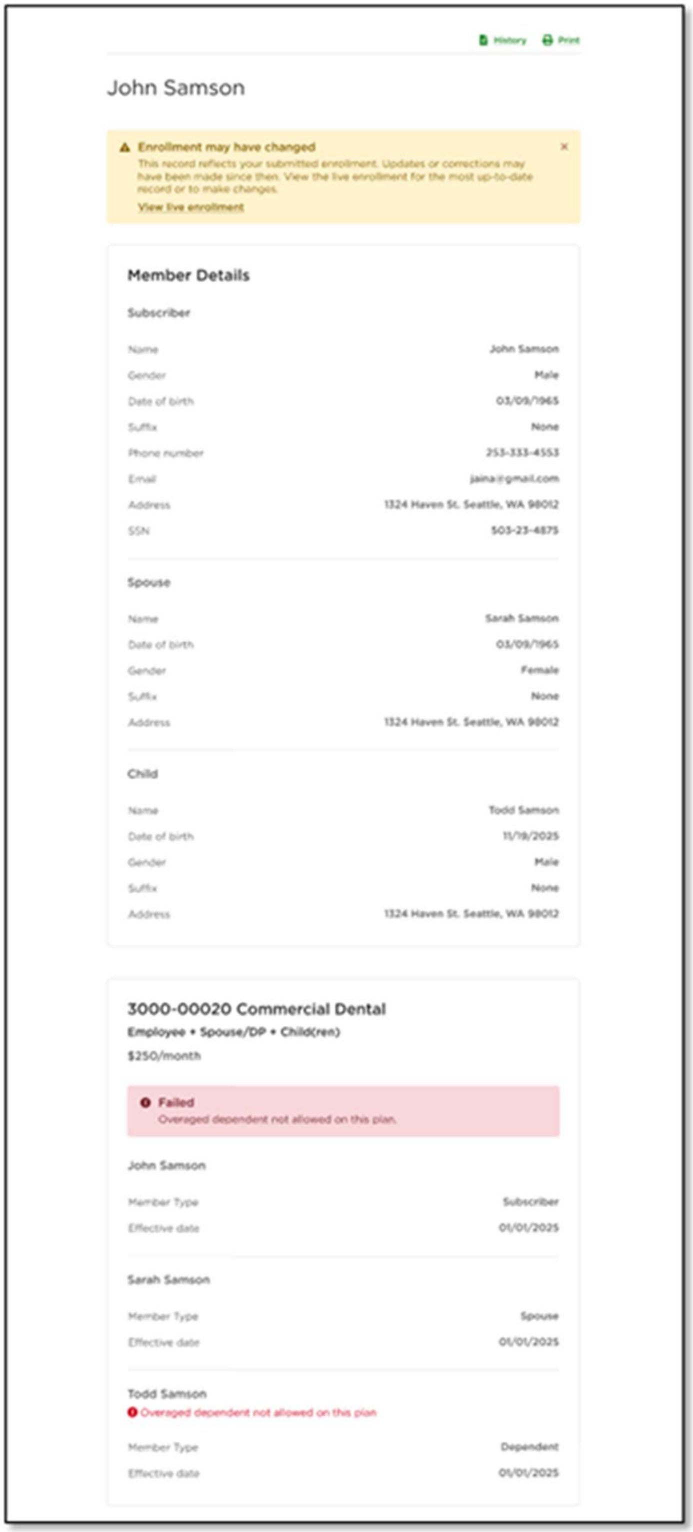
00307-11170 | H2 Pre-Cast, Inc - Salary - Cobra | Dental

Employee + Spouse/DP, Child(ren)

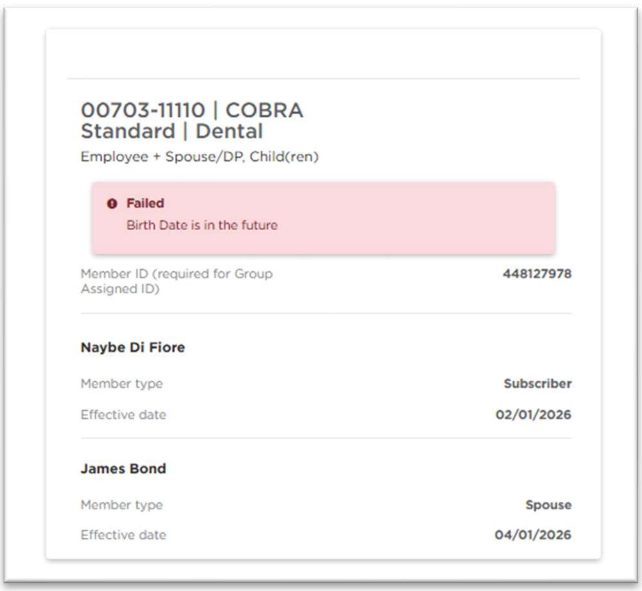
Member ID (required for Group Assigned ID)	**966242012**

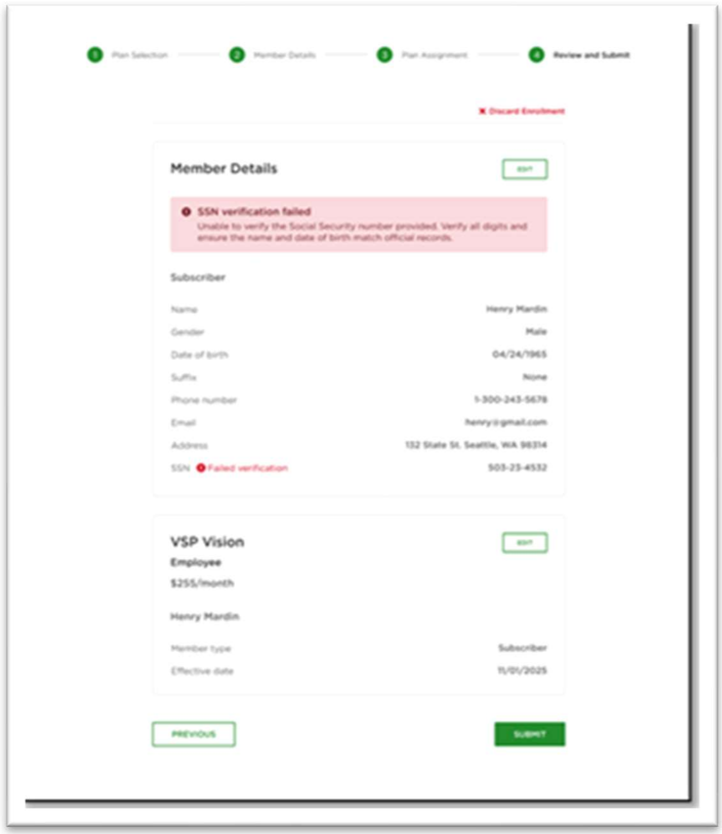
Partial Complete: This record completed partially and some adds or changes were unable to process. You can review this record for the error messages or print the confirmation of successful changes. Click to View the Live Enrollment to view the member's active live enrollment record.



Failed Transactions + Discarding Transactions

Failed (Addition or Edit): Failures that happen when adding a member and their family will display back in our add flow. From here, you can review the errors with the record and quickly edit those records to resubmit and reprocess. Failures that happen when editing a live record will display the errors and a message to visit the live enrollment card to edit the record again (we are unable to reprocess these records due to potential changes in the backend). You also have the option to discard any enrollment records that failed either in the table using the trashcan icon or in the record using the discard submission link. Discarded transactions will be removed from the table view.





Frequently Asked Questions (FAQ)

Getting Started – Application, Registration, and Login

How do I start using the tool?
To use the Online Enrollment tool, you will first need to register. An email will be generated during the registration process to complete your registration. A second email will be sent containing the passcode to complete the process.

Don't use another person's email address to access the tool. Contact your account management representative to gain access for additional users.

Can I use my subscriber login credentials to sign into Online Enrollment and fill out applications?
No. The Online Enrollment feature and Employer/Broker portals are separate from Member Portal Logins and Experiences.

Why am I getting an email when I register or change my account information?
Our security functionality requires a second element to verify your identity at initial registration or when changing account elements. This is a version of Two Factor Authentication during registration.

How long do I have before my passcode expires?
Emails sent through the secure system will expire after 72 hours or 3 calendar days. A new passcode is required after this timeframe. Please contact your Delta Dental Contact to send a new passcode.
Users with Admin Access: Passcodes can be resent via the Administration feature for any of your users who have failed to register in the allotted time.

What characters can be used to create a password?
Alphanumeric characters: A-Z, a-z, 0-9 and special characters: @ & ! . * -

Do passwords expire?
Passwords do not expire but can be changed at any time by going to the My Preferences area and then clicking on Edit Profile.

Is Two Factor Authentication available?
Two Factor Authentication is not available yet for broker and employer general login.

Managing Access/Permissions to Groups

Can User Dashboards be rearranged?
No. The order of the feature cards on the dashboard cannot be rearranged at this time.

What type of access is available?
There are two options:

- Full access: You can ADD, TERMINATE and CHANGE employees and dependent records.
  Full access is not available for groups that send an electronic 834 file.
- View access: Allows you to view information only.

What kind of access should I expect if I only have Read-Only access to groups?
Online Enrollment Read-Only accounts may only look up individual member eligibility, download ID cards, and view invoices.

What tasks are Online Enrollment Users unable to Perform?
Online Enrollment users may not be able to modify a Member ID or perform enrollments and terminations beyond your retroactive period (your group's specific contractual limits).

What do I do if I can't remember my username?

- For Employer Users: Usernames can be recovered by calling your Delta Dental contact or by calling: 1-800-408-9850 for assistance.
- For Producer/Broker Users: Follow the recover username flow utilizing your web access code at: https://www.deltadentalwa.com/self-service/producer/recover-username, or by emailing producerlicensing@deltadentalwa.com.

How can I reset my password?
You can reset your password using our password reset feature, found on:
https://www.deltadentalwa.com/self-service/recover-password

Please note: If you haven't received a code sent to your email, you may be using the incorrect username – please follow the recover username flow first and confirm you are using the correct username.

Who can update or change my account information?
You can change your password, email address and phone number directly on the website. All other changes must be requested by contacting your Sales Client Manager or Client Relations Associate.

Overview & Management of Online Enrollment

What are the hours of the Online Portal?

Online Enrollment is available Monday through Sunday, 5am to midnight Pacific Time

What Browsers are Supported?

Desktop: Microsoft Edge, Google Chrome, Mozilla Firefox, Safari 7, Safari 8

Mobile: The online Enrollment Feature is not mobile enabled.

My change is in pending status, when will it be updated?

Most updates will be completed within 5 minutes. More complex changes may take longer to process.

Will my bookmarks and shortcuts continue to work when updates occur?

Saved shortcuts may not work after major feature releases depending on whether a new URL is needed to facilitate the feature updates. You may need to set up new bookmarks if existing ones stop working.

Why am I getting an error that the website cannot be accessed from the European Union?

Our website is unavailable in the EU due to a privacy law called GDPR that a lot of US companies are not in a position to comply with. For that reason, users coming from the EU (either directly or via a corporate network / VPN / proxy) will see the "site is unavailable" page

When should I receive my invoice notification via email?

Invoice notifications are triggered on or around the 15th of the month.

How far back can I make a change?

The standard retro period is 90 days but may be different for some groups. Contact GroupSales@DeltaDentalWA.com for more information.

Can I enroll members prior to the group's effective date?

Yes, new groups and subgroups can enroll online prior to the group is effective

Do I get automatic access to my new subgroups?

If you currently have group level access, all new subgroups will be inherited on your account as they are created and processed on our backend. There may be a couple day delay as we process subgroup changes and updates. If you currently have mixed access (access to only specific subgroups), new subgroups will NOT be inherited on their account and must be assigned via our Online Enrollment Application, found here: Online Enrollment Information

Can I enroll members online prior to the group's effective date?

Yes, new groups and subgroups can be enrolled online prior to the group is effective date.

Can I request documents be placed in my Document Repository?
At this time, we are not able to place documents on demand in the repository. We welcome your input for documents you wish to see in the future.

What if I have a suggestion for the updated portal/website?
Periodically, you should see a popup for a survey on your screen. We value your insights and your needs on the portal and request you provide as much detail as possible around the challenges you may be facing or items you are missing on the portal. In the future, we may also support other feature enhancement requests.

What is the Employee ID and TPA ID field used for on the enrollment portal?
These fields are optional and allows you to add the Employee ID or TPA ID which can be pulled in with enrollment reports and reconciling.

Will users automatically get access to new subgroups added to their group?
If the user has group access, all new subgroups will be inherited on their account as they are created in DoD if they are set to Group access. If the user has mixed access, new subgroups will NOT be inherited on their account and must be assigned via an OE User Change form.

Will users see members from other employers or groups?

Users will only see members tied to groups they have access to. Employers only see members in their own groups. Brokers can see multiple groups only if they are authorized for those groups. Members with multiple jobs or groups enrollments appear separately by member ID.

Can dependents have different addresses from the subscriber?

Yes, users can uncheck “same as subscriber address” and enter a different address.

Are dependents automatically assigned to plans?

Yes, if the plan’s coverage codes allow it. If no valid coverage code exists for a dependent, they will show ineligible for that plan.

What are the different coverage codes available via the tool?

Rate Tier Definitions
FAM = Employee + Dependents

EMP = Employee Only
ESP = Employee + Spouse or Domestic Partner
E1D = Employee + One child
ECH = Employee + Two or more children
E2D = Employee + Spouse/DP + One child

E5D = Employee + Spouse/DP + Two or more children

SPO = Spouse or DP only (subscriber ineligible)
IND = One child only (subscriber ineligible)
CHD = Two or more children only (subscriber ineligible)

How do I enroll an overage disabled dependent?

Add the dependent in the system with their birthdate and select "Disabled" as the verification type. Be sure to also include the verification effective date.

How do I enroll a newborn dependent?

Newborns, adopted children, and foster children can be effective on their date of birth or placement date. If your group requires enrollments to be made on the first of the month, the coverage level would need to be the first of the month that the child was born or placed, and their effective date would be their date of birth or placement date.

Can terminations occur at different levels?

Yes, users can terminate an entire policy, a specific plan, or an individual member or dependent. All termination changes are reviewed before submission.

Can a terminated member be reinstated?

Yes, reinstatement supports no lapse in coverage (mistaken termination) or coverage with a gap (new effective date required).

Can reinstatements exclude certain dependents or plans?

Yes, users can reinstate some dependents but not others or reinstate one plan and leave others terminated. Coverage codes automatically update based on who is reinstated.

Recent Submission Failures: Error Messages

Member ID already exists for group.

The Member ID already exists under that group for a different subscriber. A different ID number is needed to continue. Universal ID Groups allows an assigned ID number that may be up to 18 characters long and can contain spaces, dashes, and letters of the alphabet.

Member ID cannot match SSN

For Universal ID Groups, the Member ID cannot match the subscriber's SSN, due to privacy concerns.

Member ID does not match. Please Re-enter.

For Universal ID Groups, the two Member ID entry fields must match to proceed.

Member ID may be a possible SSN. Please enter the Actual SSN to verify or contact a GA Rep for assistance.

For Universal ID Groups, a subscriber's Member ID may not be an SSN, and the Member ID entered meets the validation rules for an SSN. The user must enter the actual SSN to verify that the Member ID is not an SSN, or contact GA for assistance.

Member ID Required

For Universal ID Groups, a member ID must be entered to continue.

Please contact your Group Administration Representative to complete this update:

The system found a possible match, however, it cannot further refine the search criteria. Our Group Administration must complete this update.

SSN required to identify member. If SSN is unknown, please select 'Cancel' and contact your Group Administration Representative

The system found a possible match on the subscriber entered and requires the user to supply an SSN to confirm the match. If an SSN cannot be supplied, Group Administration must complete the enrollment.

This subgroup move requires a Member ID change. Please contact a GA Rep for assistance.

The subgroup has a different Member ID type. A Group Administration Representative must complete the change.

Transaction cannot be completed because a claim was processed for this member outside of the dates entered. Please contact your Group Administration Representative at 1-800-408-9850 if you have questions.

Transactions will not be processed if you are retroactively terminating an individual who has a claim on file prior to their retro term date.