

**BROKER**

# Quick Start Guide

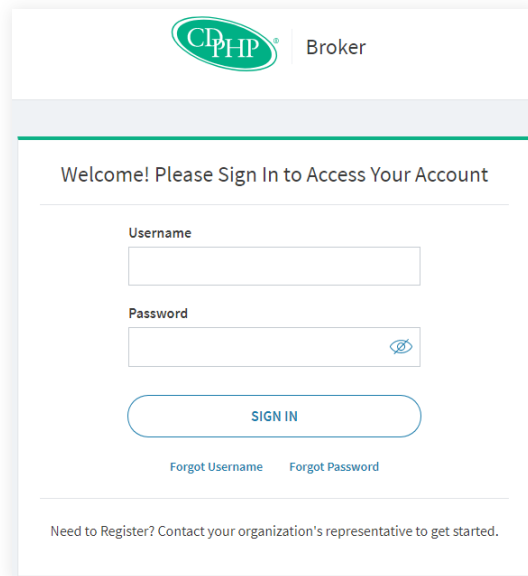


# Contents

Access the Broker Portal	3
Find Groups	3
Billing – Locate Groups	4
Billing Information	4
Pay Current Invoice	5
View Group Information	5
View ID Card	5
View Groups with Pending Contracts	6
Access Manage Enrollment	7
Add a New Subscriber	7
Update Enrollment	8
Update Personal Information	8
Terminate Contract	9
Reinstate a Subscriber	9
Incomplete Processes	10
Access Small Group Quote & Renew	10
Create a Quick Quote	11
Create a Quote for a New Small Group Prospect	11
Review Quote Details	12
Complete New Prospect Group Setup	13
Small Group Renewal	14
Member Mapping	15

## ACCESS THE BROKER PORTAL

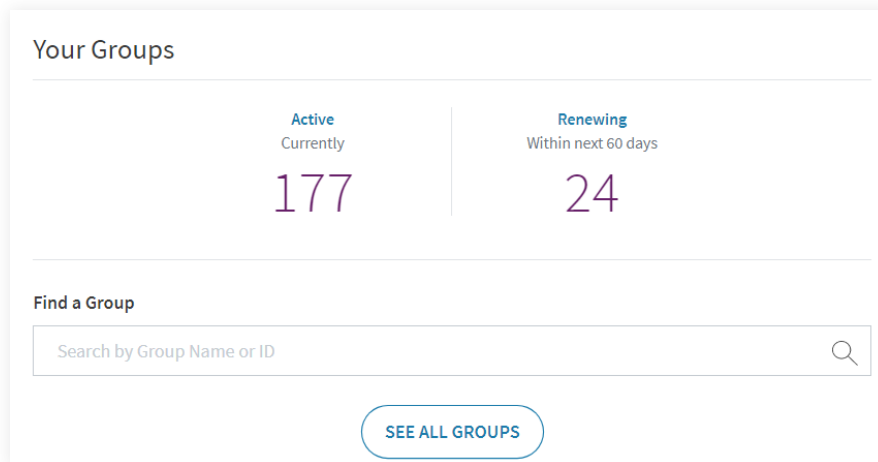
Log into the CDPHP Broker Portal at [broker.cdphp.com/login](https://broker.cdphp.com/login).



The login form for the CDPHP Broker Portal. It features the CDPHP logo and the word "Broker" at the top. Below a green header bar, a message reads "Welcome! Please Sign In to Access Your Account". The form includes input fields for "Username" and "Password" (with a toggle icon for visibility), a "SIGN IN" button, and links for "Forgot Username" and "Forgot Password". At the bottom, a note states: "Need to Register? Contact your organization's representative to get started."

## FIND GROUPS

Search for a group by typing the Group Name or ID in the Find a Group search bar, or click **See All Groups** to see a complete listing



A summary card titled "Your Groups". It displays two statistics: "Active Currently" with a value of 177, and "Renewing Within next 60 days" with a value of 24. Below this is a "Find a Group" section with a search bar labeled "Search by Group Name or ID" and a magnifying glass icon. At the bottom is a button labeled "SEE ALL GROUPS".

## BILLING – LOCATE GROUPS

View billing information for all groups from the **Billing** tab.

### HELPFUL HINTS

- ✓ Use the search bar to view billing information for specific groups
- ✓ Filter Search results by **Payment Status**

#### Find A Group

Billing information for groups that are terminated due to non-payment is available for 60 days after termination.

**Group/Subgroup Name**

**Filter by:** All Statuses

**Groups (319)**

GROUP NAME	GROUP ID	PAYMENT STATUS	CURRENT BALANCE	DUE DATE
1634 double subgroup test	40022923	Overdue	\$1,710.87	Jun 1, 2021

## BILLING INFORMATION

View billing information for a specific group to view their current balance and invoice, previous billing activity, current invoice plan summary and more.

### HELPFUL HINTS

- ✓ View and export to Excel a comprehensive list of subscribers from the current invoice
- ✓ Check the **Contact** tab to ensure the current Group Contact Information is correct
- ✓ Use the dropdown arrows in the **All Activity** tab to expand the information for each row
- ✓ Search the Current Invoice by subscriber to view billing information for a specific member

#### Subscribers: Current Invoice

☒ By Last Name ☐ By Subscriber ID

**All Subscribers (1)**

This information is available for export until the next invoice is generated. [Export to Excel](#)

SUBSCRIBER NAME	SUBGROUP	COVERAGE	PLAN TIER	PAYMENT TYPE	PLAN	COST
Mogli Kalle CD123456789	Active	Jun 1, 2021	Subscriber Only	Regular	EPO Copay First Ind 425 Silver... Pediatric Dental (no BP)	\$553.83 \$16.46 <b>Total: \$570.29</b>

## PAY CURRENT INVOICE

To pay a bill, locate the group and click on **Pay Bill** from the Billing Overview.

The screenshot shows the 'Billing Overview' page with tabs for 'Overview', 'All Activity', and 'Contact'. The 'Overview' tab is selected. It displays the 'Latest Invoice: #211390040325'. Below this, there is a section for 'Overdue' status with a red warning icon. It lists the 'Overdue Amount: \$1,710.87', 'Current Period: Jun 1, 2021', and 'Due Date: Jun 1, 2021'. To the right, a box shows the 'Current Balance: \$1,710.87'. A 'PAY BILL' button with an external link icon is highlighted with a red rectangle. At the bottom, there is a link that says 'Need Help? Contact us'.

## VIEW GROUP INFORMATION

Click on **Group Information** to view a summary of your broker agency's book of business, then use the search to pull up Group Information for a specific group.

From the Group Information page, you may:

- » View basic group details and contact information
- » View class and plan details
- » Check coverage for members
- » Access group specific Reports and Contracts
- » Access Billing and Manage Enrollment

## VIEW ID CARD

To access a member's ID card, locate the group then search for the member under Check Member Coverage. Click on the subscriber's name, then on the Member Information page click **View ID Card**.

The screenshot shows the 'Check Member Coverage' page. It has a warning icon and text: 'It may take up to 10 hours to see coverage changes you submitted reflected in this table.' Below this are two radio buttons: 'By last name' (selected) and 'By Member ID'. There is a search input field labeled 'Enter Last Name' with a magnifying glass icon. Below the search field, it says 'All Members (1)' and 'Sort by: Name A-Z'. A table lists the members with columns: MEMBERS NAME, MEMBER ID, STATUS, and ACTIVE DATE. The table has one row: 'Subscriber Mogli Kalle' (highlighted with a red rectangle), 'CD123456789', 'Active', and 'Apr 1, 2021'. To the right of the table, there is a 'View ID Card' button with a card icon.

## VIEW GROUPS WITH PENDING CONTRACTS

The View Groups with Pending Contracts alert will appear whenever a group has a contract posted to their employer portal that requires signature.

 Group(s) require a contract signature to guarantee coverage.

[View Groups with Pending Contracts](#)

Click **View Groups with Pending Contracts** to view a list of available contracts, including the Group Name and ID, Contract, Plan Effective Date and Signature Due Date.

To access and download a PDF of a group's contract, click **Reports & Documents** and search for the group.



## ACCESS MANAGE ENROLLMENT

Access Manage Enrollment to process enrollment updates for all groups, including adding new subscribers, updating existing enrollment, updating a member's personal information, and terminating contracts.

Manage Enrollment can be accessed by clicking **Manage Enrollment** on the home page, or access a group directly by searching for the group and then clicking **Manage Enrollment**.

### Manage Member Coverage

Do you need to add a member, remove a member, or view enrollment history?

[Manage enrollment](#) 

## ADD A NEW SUBSCRIBER

Add a new subscriber by clicking on **Add a Subscriber** from the group details page.

[Manage Enrollment](#) > [Bob's Tire Shop, LLC](#)

### Group Details: Bob's Tire Shop, LLC

Your Agency: N/A    Your Broker Code: N/A

Group: Bob's Tire Shop, LLC	Group ID: 40023638	Type: Small	Renewal Date: 07/01/2022
-----------------------------	--------------------	-------------	--------------------------

[Add a Subscriber](#)

[View Member Roster](#)

[Upload Census](#)

Complete the guided workflow including reason for enrollment, subscriber information, plan selection, and dependent enrollment, then click Submit.

## HELPFUL HINTS

- ✓ Use the Search for Provider feature to locate Provider ID (if applicable)
- ✓ Download a PDF of the Transaction Summary from the Enrollment Submitted confirmation page

## UPDATE ENROLLMENT

Make changes to a member due to a qualifying event using Update Enrollment. This includes plan changes and adding or removing dependents.

Locate the member using **View Member Roster**, then **View Member** and select **Update Enrollment**.

Manage Enrollment > Bob's Tire Shop, LLC > Bob Jones

### Member Details

Member ID: CD234567890	Group: Bob's Tire Shop, LLC	Group ID: 40023638	Subgroup: Active	Class Name: Employees
------------------------	-----------------------------	--------------------	------------------	-----------------------

[Update Enrollment](#) [Update PCP](#) [Update Personal Information](#) [Terminate Contract](#)

### HELPFUL HINTS

- ✓ Add new dependents on the Dependent Information step, then enroll them into coverage on the Enroll Dependent(s) step
- ✓ Remove existing dependents from coverage on the Enroll Dependent(s) step
- ✓ Download a PDF of the Transaction Summary from the Enrollment Submitted confirmation page

## UPDATE PERSONAL INFORMATION

Update a member's personal information using **Update Personal Information**.

Locate the member using **View Member Roster**, then **View Member** and select **Update Personal Information**.

Manage Enrollment > Bob's Tire Shop, LLC > Bob Jones

### Member Details

Member ID: CD234567890	Group: Bob's Tire Shop, LLC	Group ID: 40023638	Subgroup
------------------------	-----------------------------	--------------------	----------

[Update Enrollment](#) [Update PCP](#) [Update Personal Information](#) [Terminate Contract](#)

#### Spouse

Name	Date of Birth
Mary Jones	02/16/1980
<a href="#">Update Personal Information</a>	<a href="#">Update PCP</a>

### HELPFUL HINTS

- ✓ Update personal information for a dependent by locating the dependent on the Member Details page and selecting **Update Personal Information**
- ✓ Download a PDF of the Transaction Summary from the Member Update Submitted confirmation page



## TERMINATE CONTRACT

Terminate all benefits for a subscriber and enrolled dependent(s) using Terminate Contract.

Locate the member using **View Member Roster**, then **View Member** and select **Terminate Contract**.

Manage Enrollment > Bob's Tire Shop, LLC > Bob Jones

### Member Details

Member ID: CD234567890	Group: Bob's Tire Shop, LLC	Group ID: 40023638	Subgroup: Active	Class Name: Employees
------------------------	-----------------------------	--------------------	------------------	-----------------------

[Update Enrollment](#) [Update PCP](#) [Update Personal Information](#) [Terminate Contract](#)

### HELPFUL HINTS

- ✓ Terminate Contract will terminate all benefits for the subscriber/dependent(s). To terminate a single benefit for the member, use Update Enrollment
- ✓ Download a PDF of the Transaction Summary from the Termination Submitted confirmation page

## REINSTATE A SUBSCRIBER

Reinstate a terminated subscriber using **Reinstate Member**.

Locate the terminated member using **View Member Roster**, then **View Member** and select **Reinstate Member**.

Manage Enrollment > Bob's Tire Shop, LLC > Matthew James

### Member Details

Member ID: CD456789012	Group: Bob's Tire Shop, LLC	Group ID: 40023638	Subgroup: Active	Class Name: Employees
------------------------	-----------------------------	--------------------	------------------	-----------------------

[Reinstate Member](#) [Update Personal Information](#)

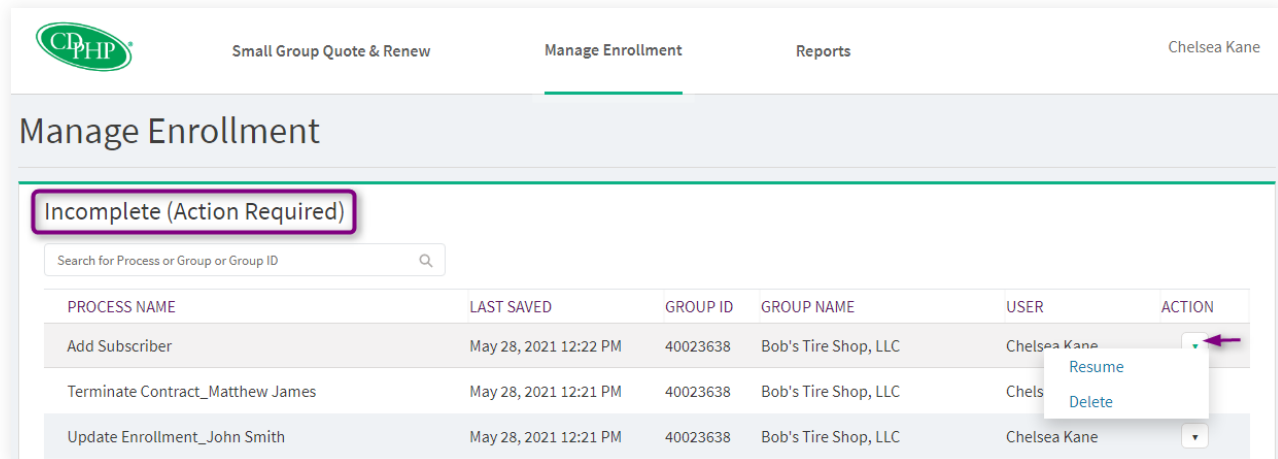
### HELPFUL HINTS

- ✓ Add new dependents on the Dependent Information step, then enroll them into coverage on the Enroll Dependent(s) step
- ✓ Decline coverage for existing dependents that are not being reinstated on the Enroll Dependent(s) step
- ✓ Download a PDF of the Transaction Summary from the Termination Submitted confirmation page

## INCOMPLETE PROCESSES

Processes that have been started but not completed are automatically saved as Incomplete (Action Required). This includes any type of enrollment transaction – Add Subscriber, Update Enrollment, Update Personal Information, Terminate Contract, and Update PCP.

Locate any Incomplete processes under **Manage Enrollment**, then **Resume** to complete the process or **Delete**.



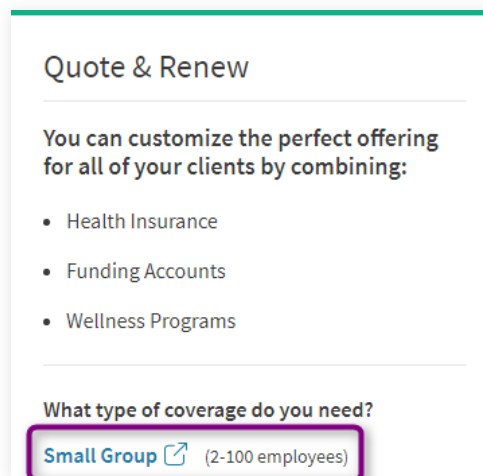
The screenshot shows the 'Manage Enrollment' page with a navigation bar at the top containing 'Small Group Quote & Renew', 'Manage Enrollment' (selected), and 'Reports'. The user 'Chelsea Kane' is logged in. Below the navigation bar is a section titled 'Manage Enrollment' with a sub-header 'Incomplete (Action Required)' highlighted by a red box. A search bar is present below the sub-header. A table lists incomplete processes with columns: PROCESS NAME, LAST SAVED, GROUP ID, GROUP NAME, USER, and ACTION. The first row is 'Add Subscriber' for 'Bob's Tire Shop, LLC' by 'Chelsea Kane'. A red arrow points to the 'ACTION' column, which has a dropdown menu open showing 'Resume' and 'Delete' options.

PROCESS NAME	LAST SAVED	GROUP ID	GROUP NAME	USER	ACTION
Add Subscriber	May 28, 2021 12:22 PM	40023638	Bob's Tire Shop, LLC	Chelsea Kane	Resume Delete
Terminate Contract_Matthew James	May 28, 2021 12:21 PM	40023638	Bob's Tire Shop, LLC	Chels	
Update Enrollment_John Smith	May 28, 2021 12:21 PM	40023638	Bob's Tire Shop, LLC	Chelsea Kane	

## ACCESS SMALL GROUP QUOTE & RENEW

Access Small Group Quote & Renew to manage your small group book of business, including adding new small group prospects and small group renewals.

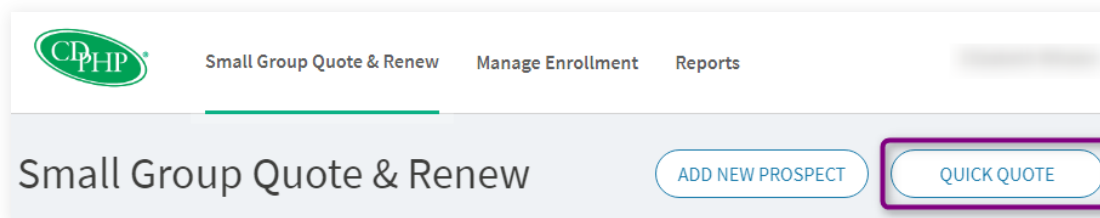
Small Group Quote & Renew can be accessed by clicking on **Small Group** under **Quote & Renew**.



The screenshot shows the 'Quote & Renew' page. It has a heading 'Quote & Renew' and a sub-heading 'You can customize the perfect offering for all of your clients by combining:'. Below this is a list of options: 'Health Insurance', 'Funding Accounts', and 'Wellness Programs'. At the bottom, there is a section titled 'What type of coverage do you need?' with a red box highlighting the 'Small Group' option, which includes a link icon and the text '(2-100 employees)'.

## CREATE A QUICK QUOTE

Select Quick Quote to create a generic quote without adding a prospect to the system.



To create a Quick Quote, enter limited details about the quote, then continue to plan selection and create a quote. Once a quote is created, you may download or email a PDF of the quote.

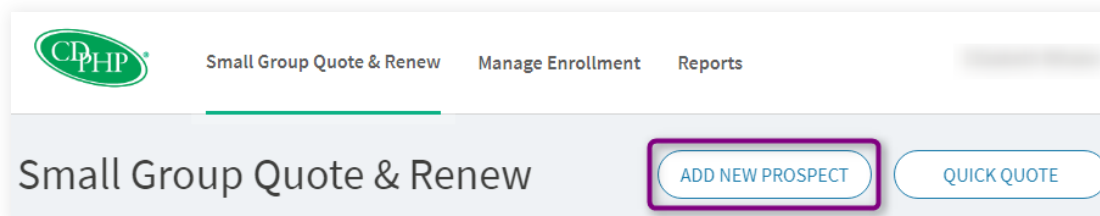
### HELPFUL HINTS

- ✓ Select Plan Filters on the Medical Plan Coverage Options step to narrow search results
- ✓ Update the required Medical Plan Coverage Options as needed by returning to the step throughout plan selection
- ✓ Compare search results by selecting the Compare checkbox(es) and then clicking Compare
- ✓ View generic Benefit Summaries and Summary of Benefits and Coverage by clicking on the applicable link

## CREATE A QUOTE FOR A NEW SMALL GROUP PROSPECT

Select Add New Prospect to create a quote for a new prospect enrolling with CDPHP.

To add a new prospect enter basic company details to verify that the group is eligible for CDPHP small group coverage, and then continue to plan selection and create a quote.



### HELPFUL HINTS

- ✓ Select Plan Filters on the Medical Plan Coverage Options step to narrow search results
- ✓ Update the required Medical Plan Coverage Options as needed by returning to the step throughout plan selection
- ✓ Compare search results by selecting the Compare checkbox(es) and then clicking Compare
- ✓ View generic Benefit Summaries and Summary of Benefits and Coverage by clicking on the applicable link

## REVIEW QUOTE DETAILS

After a new prospect or renewal quote has been created, review the quote to Download, Email, Modify, or Accept the quote.

### HELPFUL HINTS

- ✓ Download Quote to instantly access a Quote PDF
- ✓ Email Quote to instantly email a Quote PDF to a selected recipient
- ✓ Access generic Benefit Summary and Summary of Benefits and Coverage documents
- ✓ View email history

Small Group Quote > Bob's Tire Shop, LLC > Quote Details

## Quote Details

ACCEPT QUOTE

MODIFY QUOTE

Group Name: Bob's Tire Shop, LLC

Group ID: N/A

Quote Created Date: 05/24/2021

Quote Effective Date: 07/01/2021

Quote Expiration Date: 08/01/2021

Download Quote

Email Quote

### Medical

PLAN NAME	EMPLOYEE ONLY	EMP/SPOUSE	EMP/CHILD(REN)	EMP/FAMILY	LINKS TO DOCUMENTS
EPO Copayment 121 Platinum	\$836.28	\$1,672.57	\$1,421.68	\$2,383.41	▼
Embrace Health EPO Copayment 221 Gold	\$721.89	\$1,443.78	\$1,227.21	\$2,057.39	▼

### Dental

PLAN NAME	EMPLOYEE ONLY	EMP/SPOUSE	EMP/CHILD(REN)	EMP/FAMILY	LINKS TO DOCUMENTS
Delta Dental PPO TRADITIONAL 1.5	\$34.83	\$73.76	\$70.48	\$112.24	▼

## COMPLETE NEW PROSPECT GROUP SETUP

View and access your prospects from the Prospects list under Small Group Quote & Renew. Select **Accept Quote** from the newly created New Prospect Quote to begin group setup.

Small Group Quote > Bob's Tire Shop, LLC

### Prospect Details

Prospect: Bob's Tire Shop, LLC | Type: Small | # Employees: 26 | Effective Date: 07/01/2021

#### Prospect Status

Quote Pending | Group Setup | Group Setup Processing | Group Setup Complete | Complete

#### Next Step

You have created a quote! Please review, modify, and/or accept the quote.

**ACCEPT QUOTE** | Review Quote

Complete the guided workflow including the Employer Application and attestations, and upload any required documentation. Review the Group Setup summary and signature, then **Submit**.

Once a group has been submitted, select **Add a New Subscriber** to add enrollment.

### Group Details: Bob's Tire Shop, LLC

Your Agency: N/A | Your Broker Code: N/A

Group: Bob's Tire Shop, LLC | Group ID: 40023638 | Type: Small | Renewal Date: 07/01/2022

[Add a Subscriber](#) | [View Member Roster](#) | [Upload Census](#)

#### Group Status

✓ | ✓ | ✓ | Group Setup Complete | Complete

#### Next Step

You have completed Group Setup, and the group has been processed by CDPHP! In order to complete the group, you must also add enrollment.

**Enrolled Members**

0

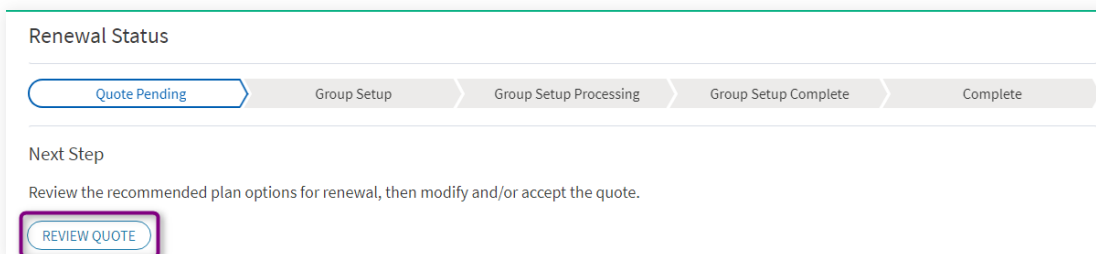
**ADD A NEW SUBSCRIBER**

The Group Status tracker will move to Complete once all group setup steps have been completed and enrollment has been added to the group.

## SMALL GROUP RENEWAL

View and access your agency's upcoming renewals from the Open Renewals list under Small Group Quote & Renew.

To start a renewal, click on **Review Quote** from the Renewal Status tracker on the Group Details Page.



Review the recommended plans for renewal based on the group's current plans, then create a quote by shopping for alternative plans or renewing with recommended plans.

Once a renewal quote has been created, you may Download, Email, Modify, or Accept the quote to complete renewal group setup.

To complete renewal group setup, complete the guided workflow and upload any required documentation, then click **Submit**.

Once a group has been submitted, complete Member Mapping or make individual enrollment updates.

The Renewal Status tracker will move to Complete once all group setup steps and all members have been completed.

## MEMBER MAPPING

Complete Member Mapping to move all current members to their new plans for renewal.

Member Mapping will be available once Group Setup has been completed, and can be accessed from the Renewal Status tracker.

**Renewal Status**

Progress: [✓] [✓] [Group Setup Processing] [Group Setup Complete] [Complete]

**Next Step**

You have completed Group Setup! The group has been submitted to CDPHP for processing. In order to complete the renewal, you must also complete Member Mapping for all benefits or update members individually using Update Enrollment.

Member Completed	Member In Progress	Member Not Started
0	0	36

[MAP MEMBERS](#) [VIEW UNMAPPED MEMBERS](#) [Update Enrollment](#)

To complete Member Mapping, select both the current plan and renewal plan to view the members that are currently enrolled. Verify/make updates then click **Next** to complete the transaction.

**Member Mapping**

Plan Selection

Please select current and renewal plans to view currently enrolled members. You may map all members to the selected renewal plan, or make new selections by member.

Select current plan: HDHMO Qualified 324 Silver DP - Employee

Select renewal plan: HDHMO Qualified 324 Silver - Employee

[VIEW MEMBERS](#)

<input checked="" type="checkbox"/>	Name	Member ID	Current Plan	Renewal Plan
<input checked="" type="checkbox"/>	Katherine Jones	CD123456789	HDHMO Qualified 324 Silver DP	HDHMO Qualified 324 Silver - E ▼
<input checked="" type="checkbox"/>	Robert Smith	CD234567890	HDHMO Qualified 324 Silver DP	Embrace Health EPO Copayme ▼
<input checked="" type="checkbox"/>	Jason Jacobs	CD345678901	HDHMO Qualified 324 Silver DP	Embrace Health EPO Copayme ▼
<input type="checkbox"/>	John Johnson	CD456789012	HDHMO Qualified 324 Silver DP	HDHMO Qualified 324 Silver - E ▼
<input type="checkbox"/>	Jennifer Doe	CD567890123	HDHMO Qualified 324 Silver DP	HDHMO Qualified 324 Silver - E ▼

Continue to Map Members until all members are completed.

### HELPFUL HINTS

- ✓ Deselect members as needed when viewing members to map
- ✓ Use the Renewal Plan dropdown to make plan changes for individual members
- ✓ View Unmapped Members to view all In Progress or Not Started members
- ✓ If a member cannot be mapped as is, use Update Enrollment to move to Member Completed
- ✓ Download a PDF of the Transaction Summary from the Enrollment Submitted confirmation page