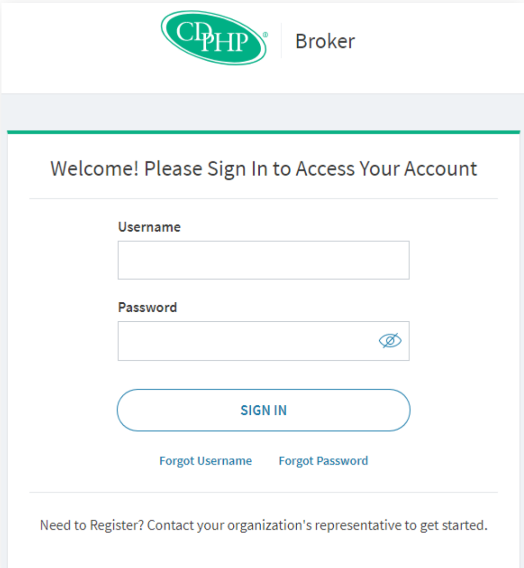
BROKER
Quick Start Guide

Contents

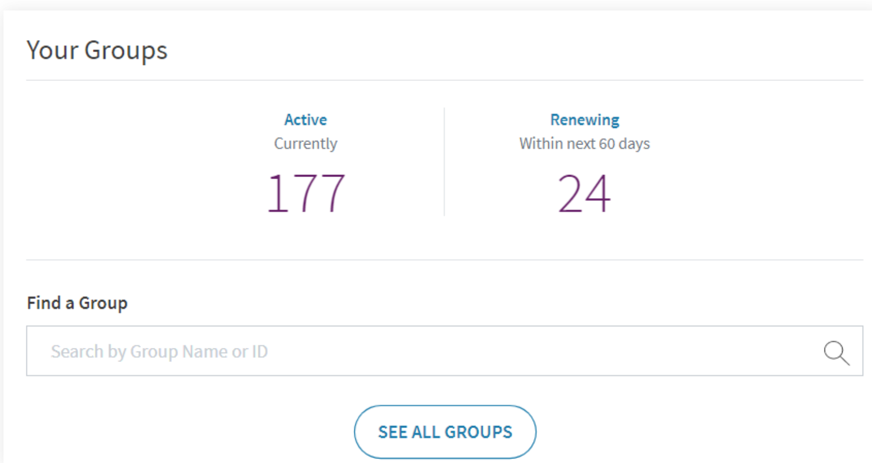
ACCESS THE BROKER PORTAL

Log into the CDPHP Broker Portal at **broker.cdphp.com/login**.



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

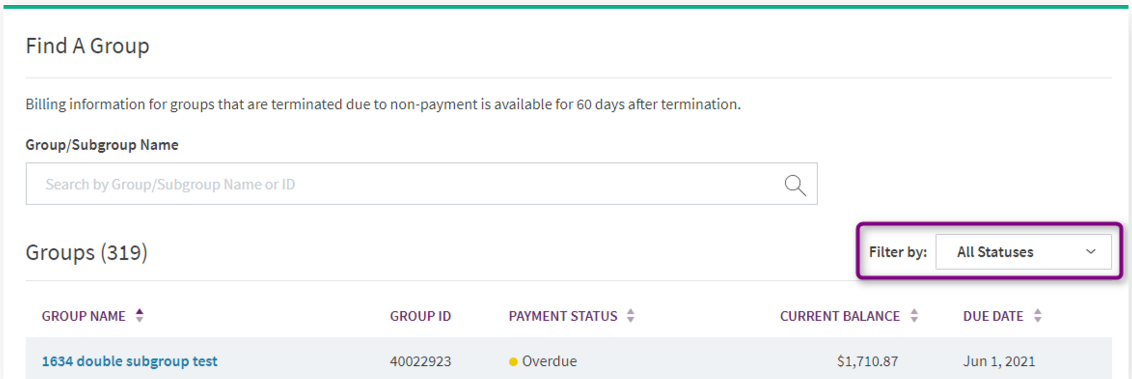


BILLING – LOCATE GROUPS

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**

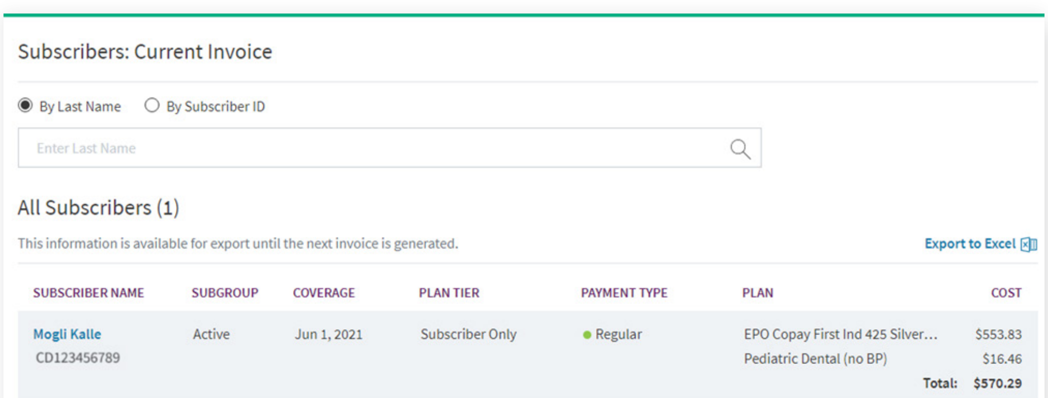


BILLING INFORMATION

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

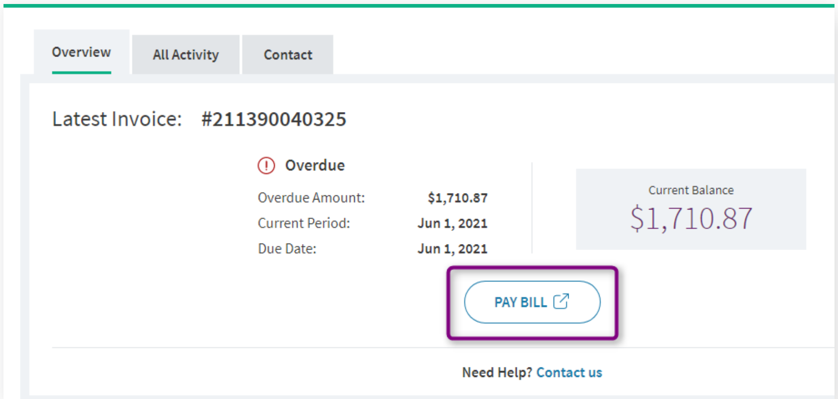
HELPFUL HINTS

- ✓ 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



PAY CURRENT INVOICE

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



VIEW GROUP INFORMATION

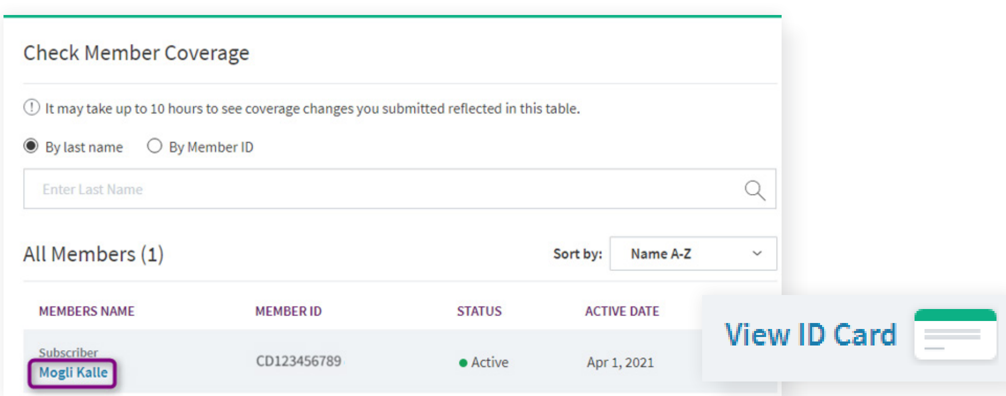
Click on **Group Information** to view a summary of your broker agency's book of business, then use the search to pull up Group Information for a specific group.

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

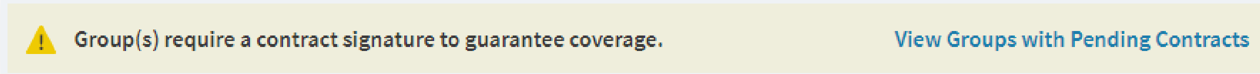
VIEW ID CARD

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**.



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.



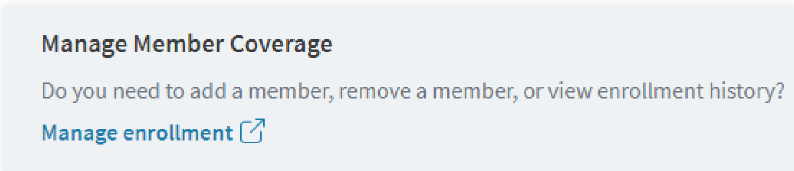
Click **View Groups with Pending Contracts** to view a list of available contracts, including the Group Name and ID, Contract, Plan Effective Date and Signature Due Date.

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**.



ADD A NEW SUBSCRIBER

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

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

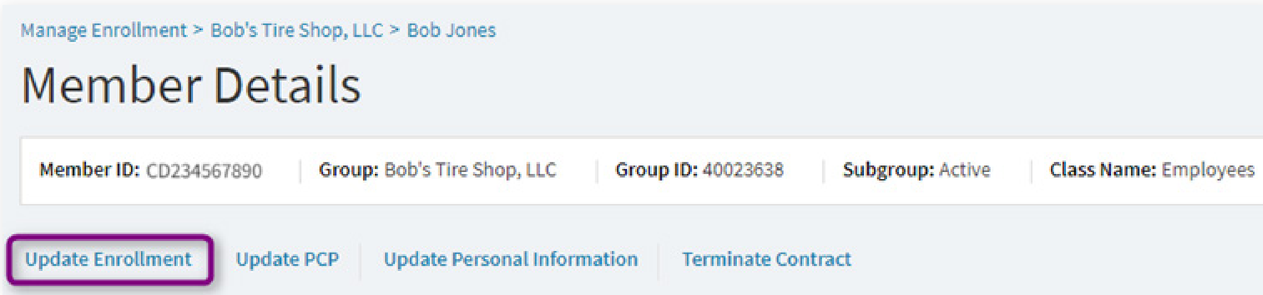
HELPFUL HINTS

- ✓ 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**.



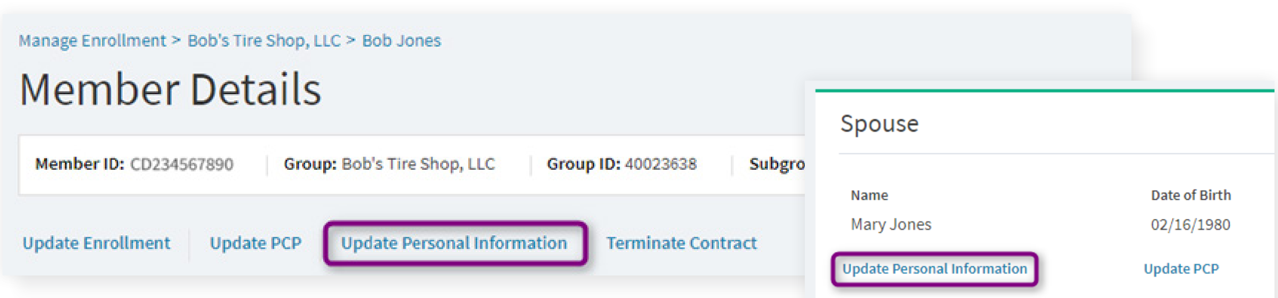
HELPFUL HINTS

- ✓ 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**.



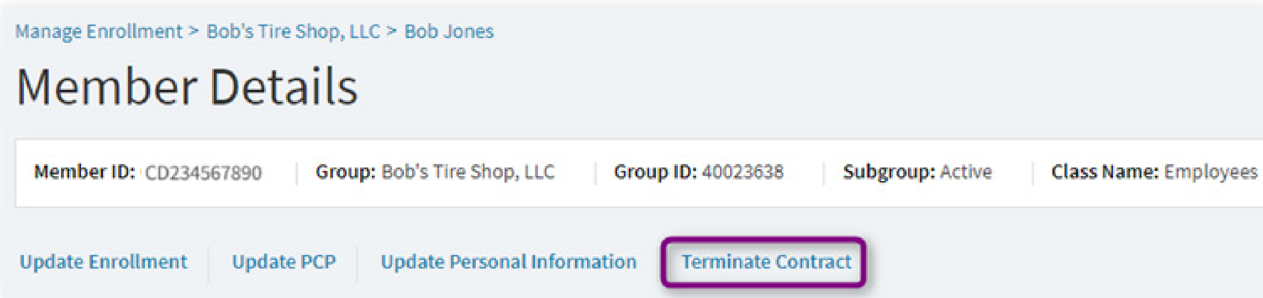
HELPFUL HINTS

- ✓ 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**.



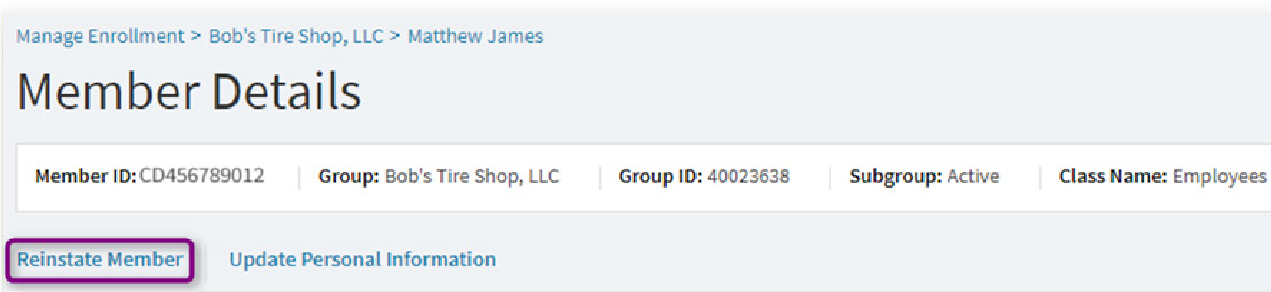
HELPFUL HINTS

- ✓ 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**.



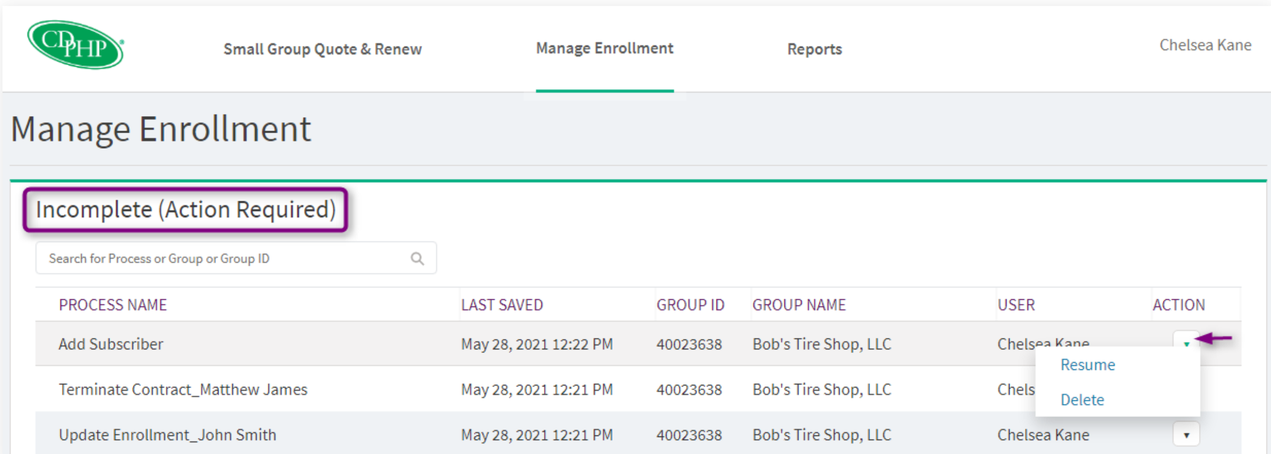
HELPFUL HINTS

- ✓ 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.

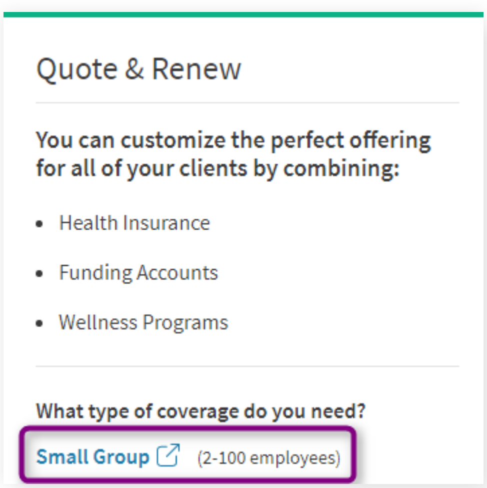
Locate any Incomplete processes under **Manage Enrollment**, then **Resume** to complete the process or **Delete**.



ACCESS SMALL GROUP QUOTE & RENEW

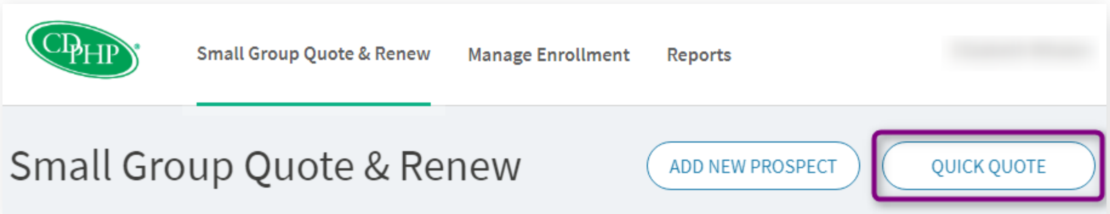
Access Small Group Quote & Renew to manage your small group book of business, including adding new small group prospects and small group renewals.

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



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.

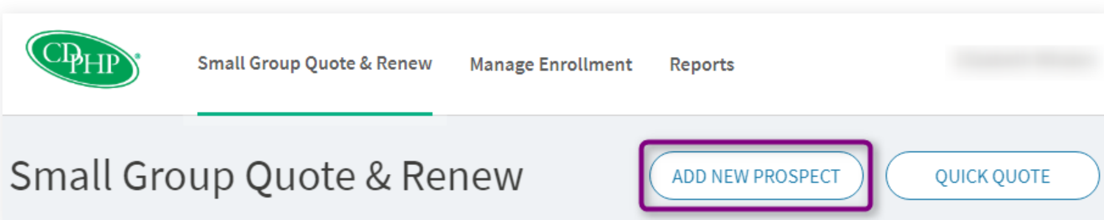
HELPFUL HINTS

- ✓ 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

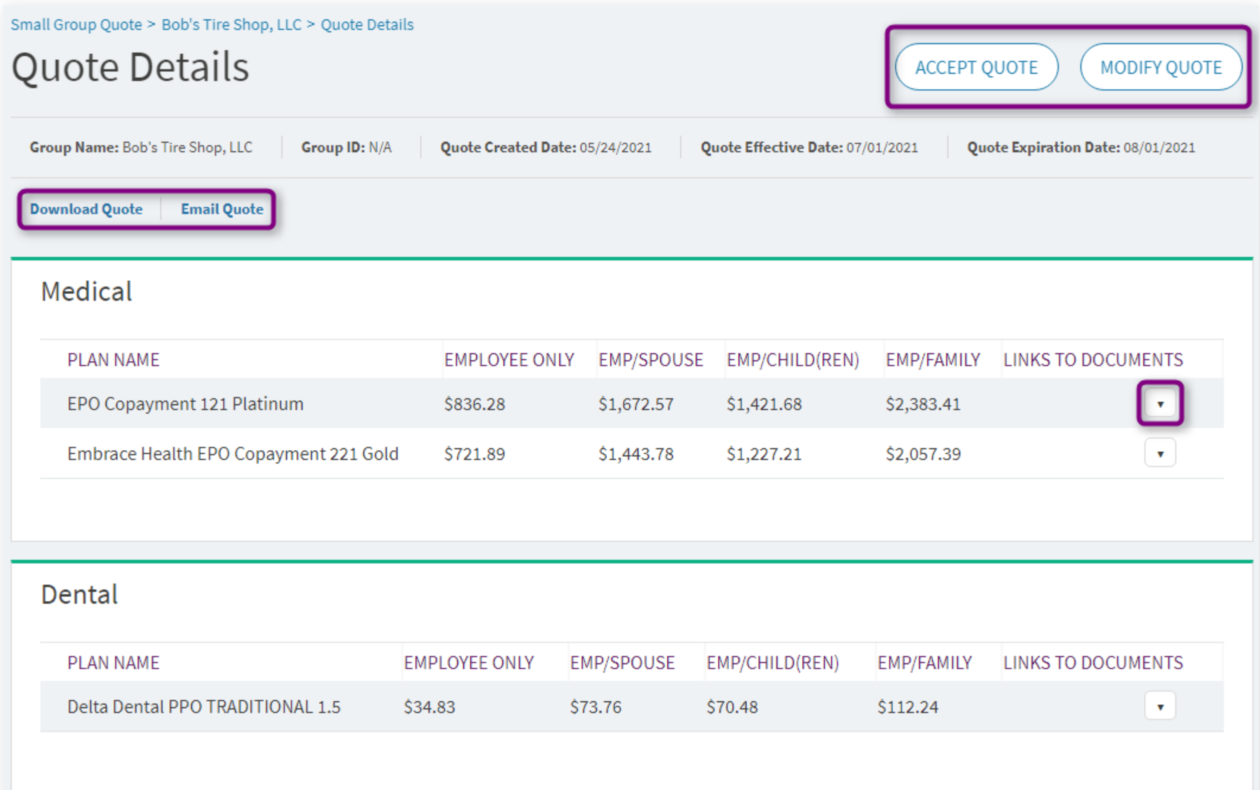
- ✓ Select Plan Filters on the Medical Plan Coverage Options step to narrow search results
- ✓ Update the required Medical Plan Coverage Options as needed by returning to the step throughout plan selection
- ✓ Compare search results by selecting the Compare checkbox(es) and then clicking Compare
- ✓ 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

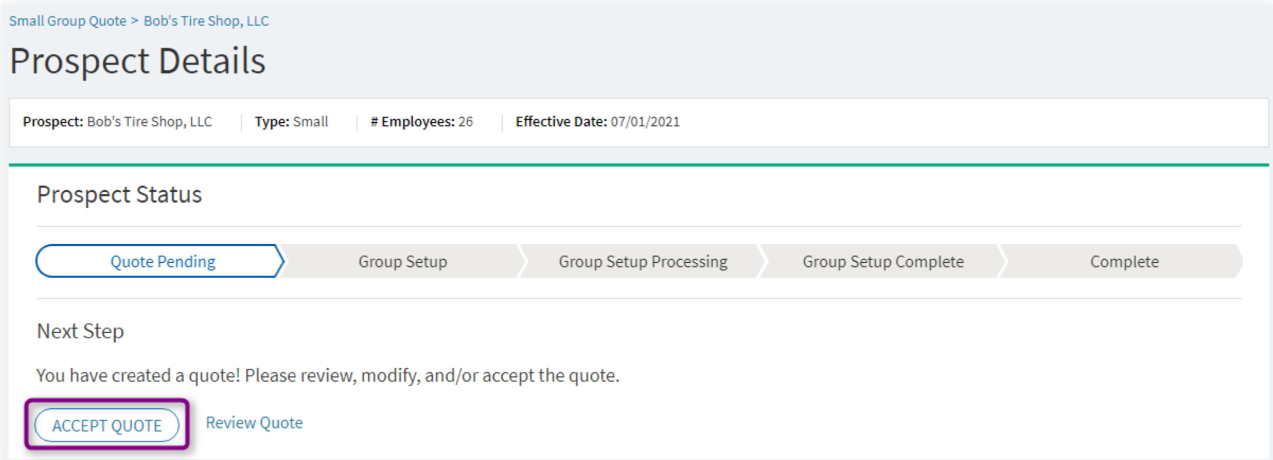


PLAN NAME	EMPLOYEE ONLY	EMP/SPOUSE	EMP/CHILD(REN)	EMP/FAMILY	LINKS TO DOCUMENTS
EPO Copayment 121 Platinum	$836.28	$1,672.57	$1,421.68	$2,383.41	▾
Embrace Health EPO Copayment 221 Gold	$721.89	$1,443.78	$1,227.21	$2,057.39	▾

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	▾

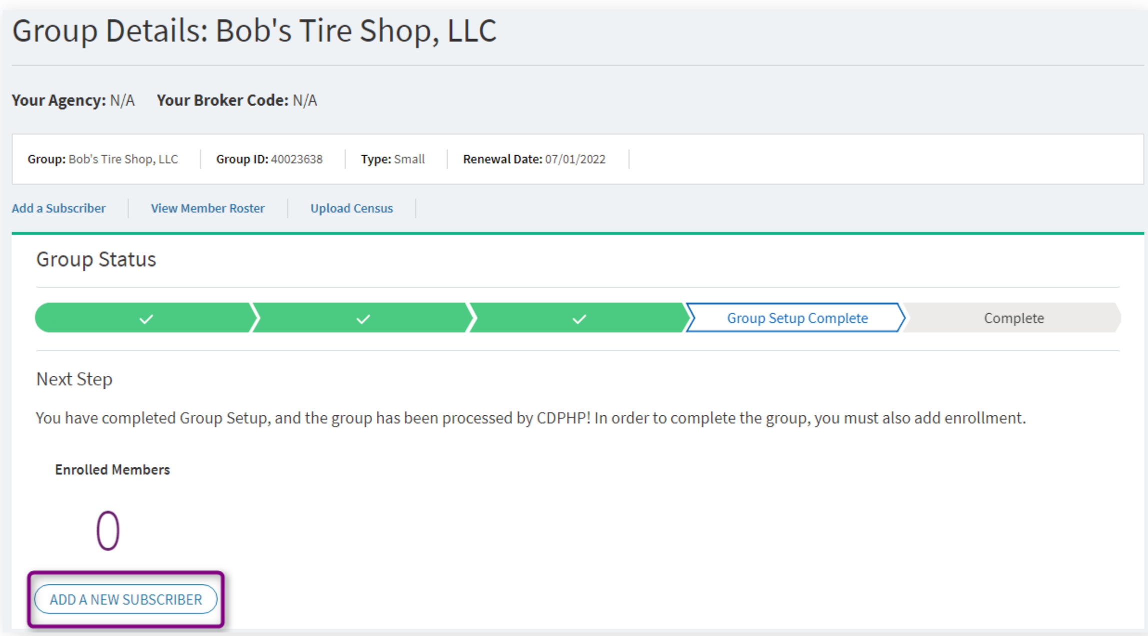
COMPLETE NEW PROSPECT GROUP SETUP

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.



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.

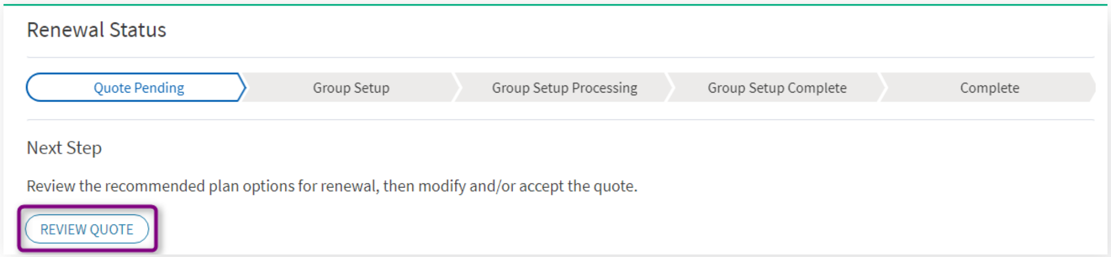


The Group Status tracker will move to Complete once all group setup steps have been completed and enrollment has been added to the group.

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**.

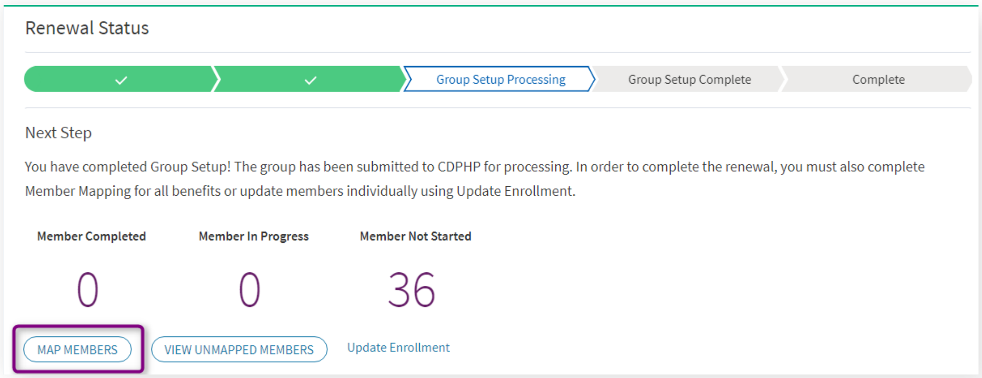
Once a group has been submitted, complete Member Mapping or make individual enrollment updates.

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

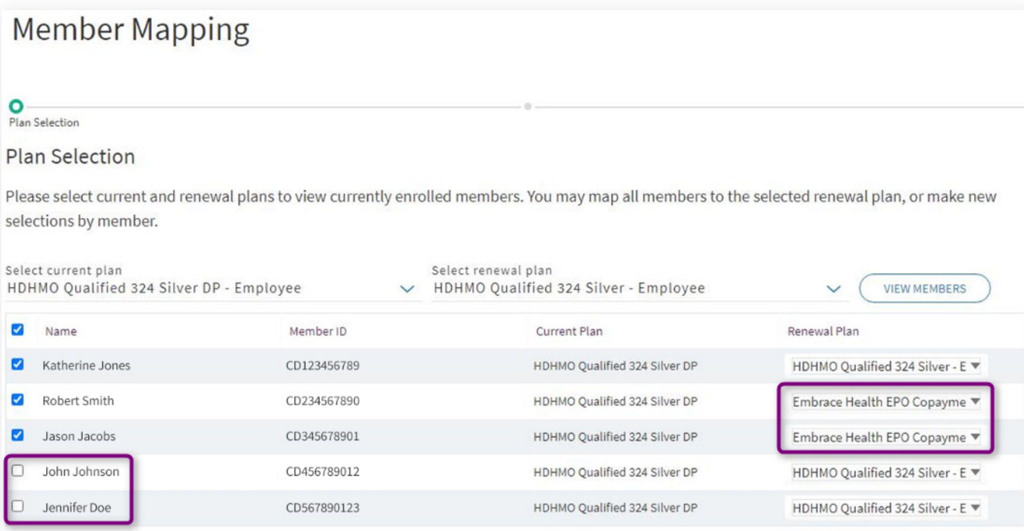
MEMBER MAPPING

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.



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.



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