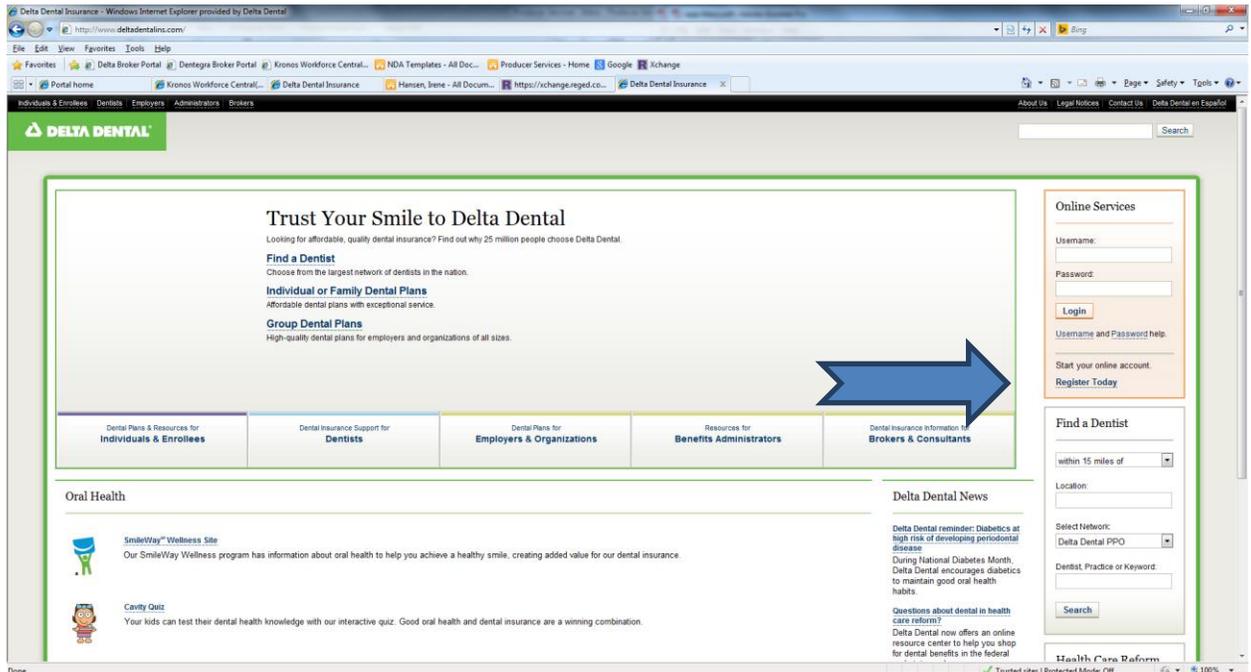


Delta Dental Broker Portal – Application for Appointment Guide

- Visit our Website www.deltadentalins.com
- Select **Register Today**



- In the drop down menu select **Broker**



- Create an account by filling in all fields and then select **Create Account**. Select **Continue**. After the account has been created, login to the main page to complete your application.

- Some of the information you entered into your profile will populate over to the Form.
- All fields are required unless marked optional
- When you select **Browse** to upload your W-9 it may take a few minutes while a virus scan verifies the integrity of the document

Business Information

Business Type

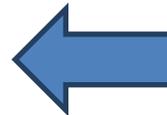
Tax ID Number / SSN

National Producer Number

Form W-9

Legal Business Name

Business Alias (Optional)



Primary Contact

First Name

Last Name

Email

Title

Business Phone (eg. xxx-xxx-xxxx)

Cell Phone (eg. xxx-xxx-xxxx)

Fax (Optional)

Office Address

Use Office Address for Mail Correspondence

Country

Street Address

(Optional)

City

State

Postal Code

Mailing Address

Country

Street Address

City

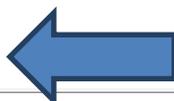
State

Postal Code

Yes No Has this business ever been disqualified by an Insurance Department?

Agents and Users

Team Member



- In the section **Agents and Users**, select **Add a Team Member** even if you are the only agent applying for appointment. If you are an agency submitting an application, add all agents who are requesting appointment.
- In the agent profile section, make sure you attach a license for every state that you wish to be appointed in.

Licenses

Provide a license for each state in which you want to be appointed

[Add Another License](#)

No.	State	Agent License #	License Copy
1	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Browse..."/>

- After you complete all the required fields, select **Save Agent** at the bottom of the screen and you will be directed back to the Business Appointment Form. If any fields in the agent profile were missed, you will see an **Incomplete status** by the agent profile. Select **Edit** and you will be directed back to the agent profile page and you can select [Show Missing Information](#) and you will be prompted to fill out any missing fields. Once the profile has been saved you will be directed back to the main Business Appointment page.

DELTA DENTAL **Broker Sales Portal**

User Profile [Show missing information](#)

Account Information

User Information

First Name

- Next select **Add Account** under the **Banking** Section of the form. In the drop down menus, pick who you want the commission paid to, mailing address, payment contact and email address (this information will be populated from your filled out application) Add the method of payment that you prefer and select **Save**.



Banking Information

Payee Name

Jim Broker ▾

Name as it appears on the account statement

Payee Mailing Address

Select ▾

Payment Contact

Contact Name

Select ▾

Contact Email

Contact Mailing Address

Select ▾

Payments

Payment Method

Check Direct Deposit

Commission Statements

Mail Email Both

Save

Cancel

- Make sure you check the box under the **Agreement** section after you have read the **Business Associate Agreement** as this will then activate the **Submit Application** Button.

Agreement

I've read and accept the [Business Associate Agreement \(PDF, 26KB\)](#)

Submit Completed Application

By checking the box next to the agreements and submitting your application, you acknowledge and accept that the terms of the agreements have been read and understood. Your application will be reviewed and the status of appointment will be returned by email.

Save Application

Submit Application

- Once you have selected **Submit Application** you should receive an email confirmation from Producer Services that your request for appointment has been accepted.
- Please note that if you wish to go back to the previous field that you should select **Cancel** instead of the back arrow on the webpage. Selecting the back arrow will log you out of the site.
- Also, you can select **Save Application** at any time should you need to fill out the remainder of the application at another time.