# Welcome to Delta Dental's eBillPay Frequently Asked Questions

**To find the answers to many commonly asked questions, select a topic and then click the hyperlink to read more or watch a how to video**

## User tips

- **Page navigation**

## Viewing invoices

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- **How do I navigate my invoices?**
- **How can I save a PDF copy of this invoice for my records?**
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## Group Reconciliation: Submitting enrollee additions, changes, or terminations

- **How can I edit enrollee details on a current invoice?**
- **How can I submit enrollee additions?**
- **How can I view and add notes associated with this invoice?**
- **How can I view the Invoice Reconciliation page?**

## Viewing payment history

- **How can I view my payment history?**

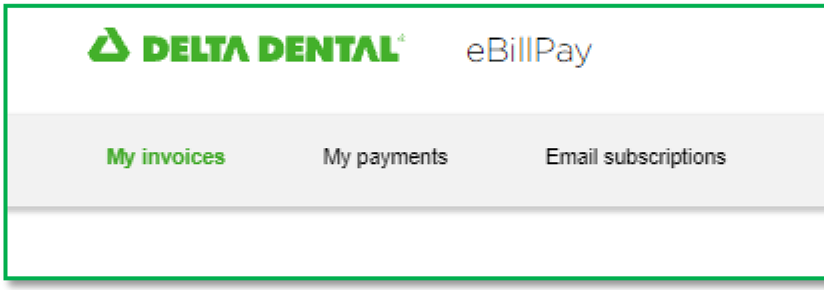
| **Need further assistance?** |
| --- |
| **Customer Service** |
| Please contact your Delta Dental billing representative for assistance with all billing and eBillPay related issues. |
| Hours of Operation |
| Delta Dental's hours of operation are Monday through Friday, 8:00 AM to 5:00 PM in your local time zone, excluding holidays. |

## User tips

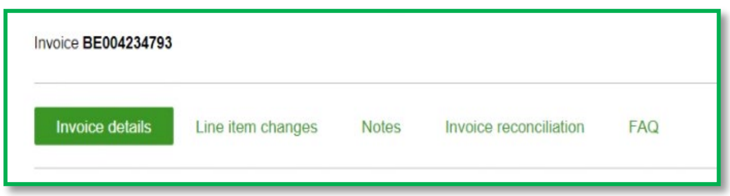
### Page navigation

Delta Dental's eBillPay is a Web-based application in which you can navigate as you would any online tool. There are several types of links available on pages throughout the application and navigating via these links is the best way to quickly reach the locations within the tool where you want to do your work.

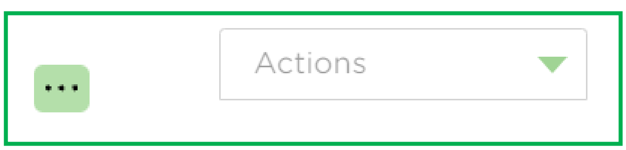
**Primary navigation links.** At the top of many pages in eBillPay, you will find the following primary links displayed from left to right: My invoices, My payments and Email subscriptions.




**Second navigation links.** Once you click an invoice hyperlink, you will find a second layer of navigation links displayed from left to right: Invoice details, Line-Item changes, Notes, Invoice reconciliation, and FAQ. Links of this type enable you to navigate to pages where you can perform tasks within the system or view information in a separate window.



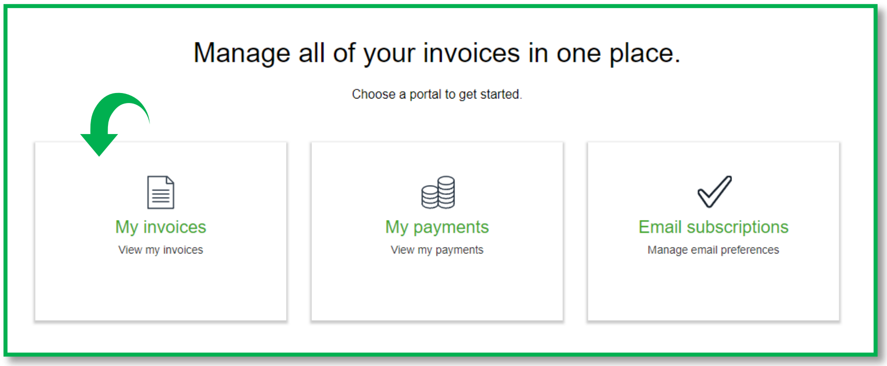

**Icons** below allows for more transactional options throughout the portal.

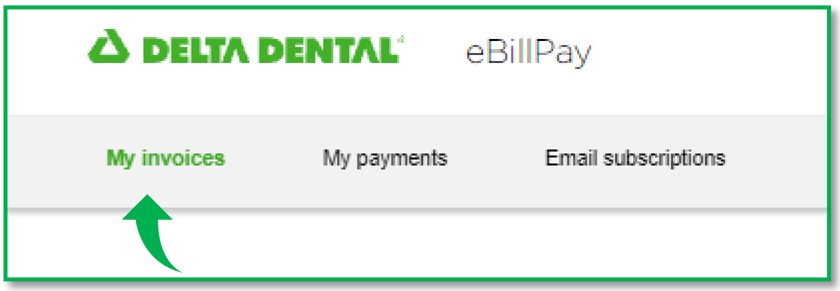


## Viewing invoices

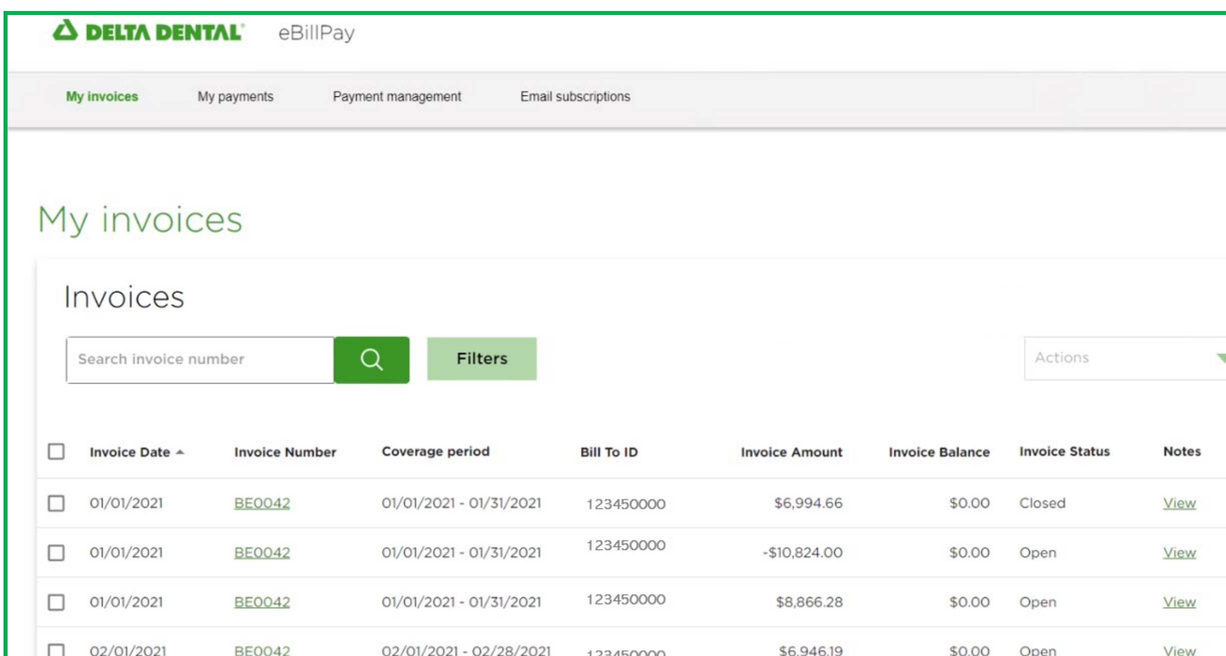
**How can I view my invoices?** → [Click here for: How to view my invoice video]

The easiest way to view your invoice is to click "My Invoices" Portal icon from the landing page or from the navigation bar at the top of your eBillPay window.




The system then displays my Invoices page where you can search for, view and export selected invoices.

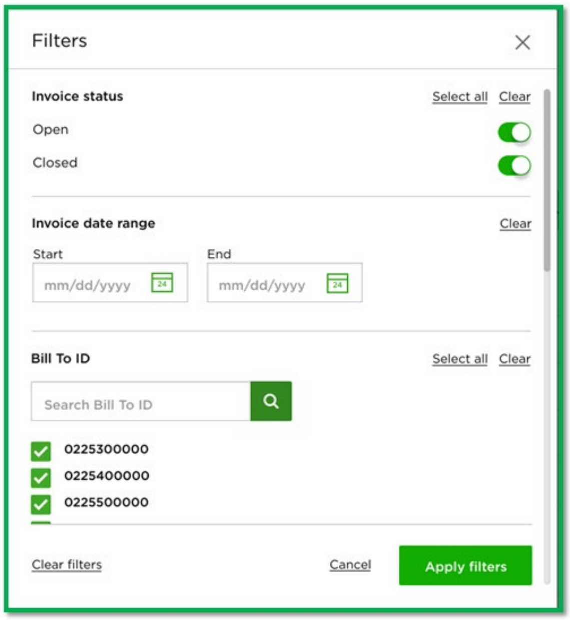



| | Invoice Date | Invoice Number | Coverage period | Bill To ID | Invoice Amount | Invoice Balance | Invoice Status | Notes |
|---|---|---|---|---|---|---|---|---|
| ☐ | 01/01/2021 | BE0042 | 01/01/2021 - 01/31/2021 | 123450000 | $6,994.66 | $0.00 | Closed | View |
| ☐ | 01/01/2021 | BE0042 | 01/01/2021 - 01/31/2021 | 123450000 | -$10,824.00 | $0.00 | Open | View |
| ☐ | 01/01/2021 | BE0042 | 01/01/2021 - 01/31/2021 | 123450000 | $8,866.28 | $0.00 | Open | View |
| ☐ | 02/01/2021 | BE0042 | 02/01/2021 - 02/28/2021 | 123450000 | $6,946.19 | $0.00 | Open | View |

To sort the list of invoices: Click the column header region of any of the following columns to sort the list of invoices in ascending or descending order:

- Invoice Date
- Invoice Number
- Coverage period
- Bill To ID
- Invoice Amount
- Invoice Balance
- Invoice Status

A little black arrow will appear pointing ▲ or ▼ to help indicate which column and order you are using to sort. To Search for a specific invoice, type the invoice number into the search bar and hit enter or the search button.




To filter the information that displays on the results page, select an option from the Filter drop-down list. You are able to filter by :

- Invoice status ( Open, close)
- Invoice date range
- Bill to ID ( if you have access to multiple)

To view an invoice:
Click on the hyperlinked invoice number of the Invoice you want to view.


**How do I navigate my invoice?** → **Click here for: How to navigate my invoice video**

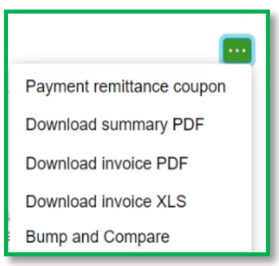
Delta Dental’s invoices are initially presented in a summarized format containing the invoice summary and remittance options and group summary section(s) that can be expanded or collapsed as needed.

Use the hyperlink, Expand all sections, at top right corner to expand or collapse as needed. You could also click on the + and - button next to each section(s) to only expand or collapse that specific section(s).

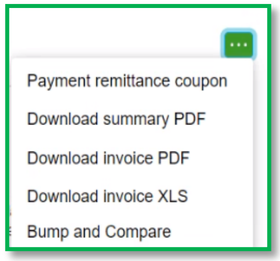
The cover page of the invoice provides important Delta Dental information.

- Delta Dental's address
- Plan underwritten and administered
- Methods to contact us.

**How can I save a PDF copy of this invoice for my records?**



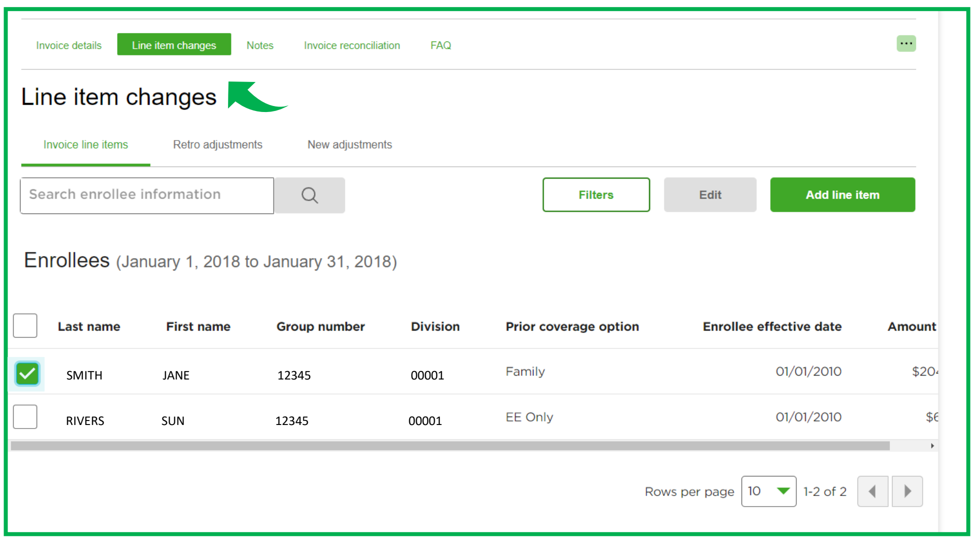

To download a PDF copy of your invoice, locate the more icon ··· at top right-hand side of the invoice detail screen. Click on icon for drop down menu. Base on your contract type you may have more than one type of PDF version available to you. Select the PDF version you would like to download.




**How can I download this invoice in excel format?**

To download a copy of your invoice in excel format, locate the more icon at top right-hand side of the invoice detail screen. Click on icon for drop down menu. Select “Download invoice XLS”.

## Group Reconciliation: Submitting enrollee additions, changes, or terminations




**How can I edit enrollee details on a current invoice?**

To edit enrollee details on an invoice you will have to first select the invoice from results screen and click on “line-item changes” from the top of the invoice detail screen.

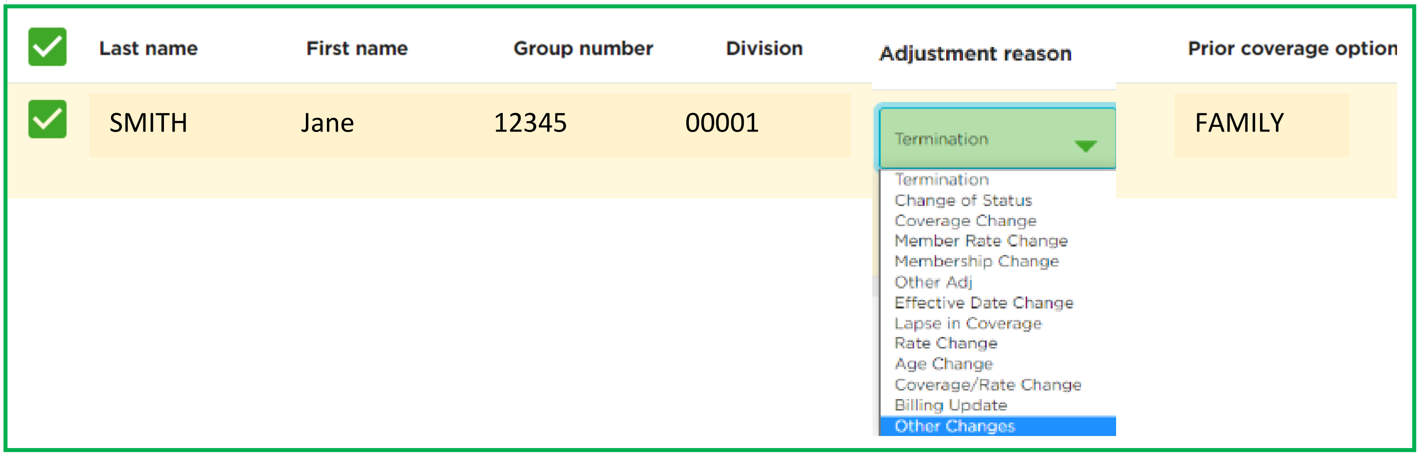
You will be presented with a new screen with three additional tabs:

- Invoice line items: list of all current enrollees
- Retro adjustments: list of all retro activities (additions, terminations, and coverage changes)
- New Adjustments: list of all changes submitted for current invoice

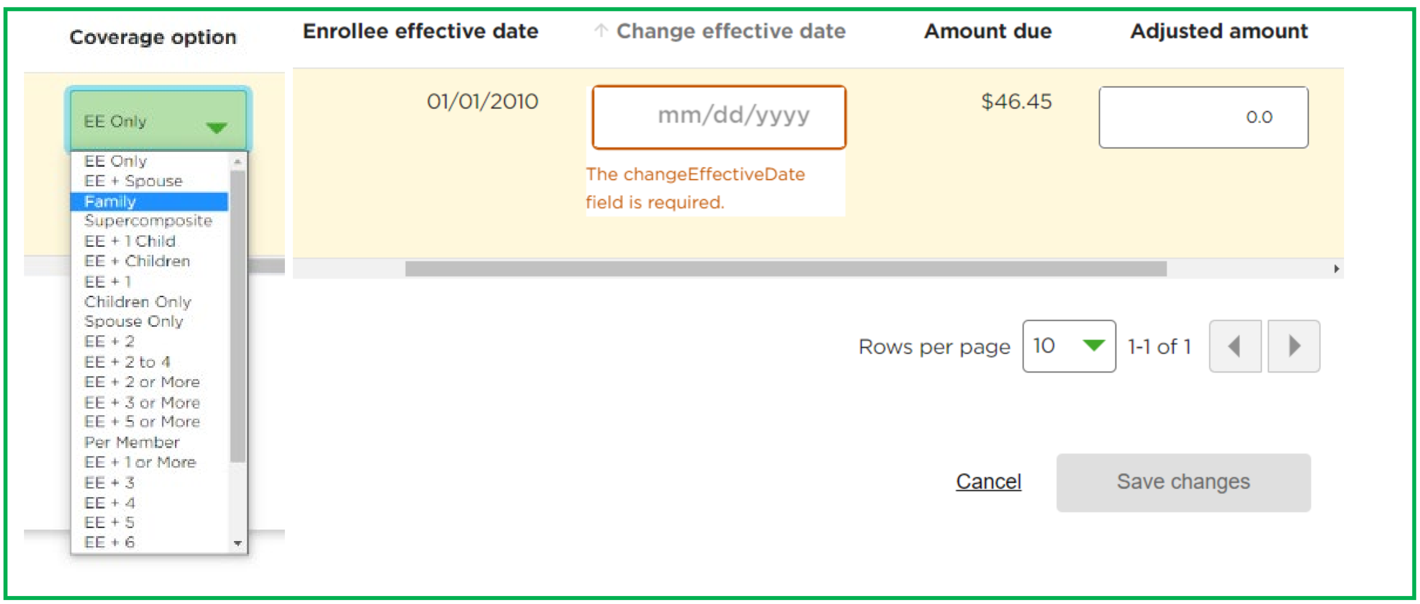
Select the tab you wish to use to initiate line-item change.

Click on box next to member(s) you want to initiate change.

Click on edit




You will be brought to a new screen with the member(s) you have selected.
Under adjustment reason, click on green drop down arrow to select from available adjustment reasons.
Scroll to the right for more edit fields




If coverage change related option is selected for change reason, under "coverage option" select the new appropriate coverage.

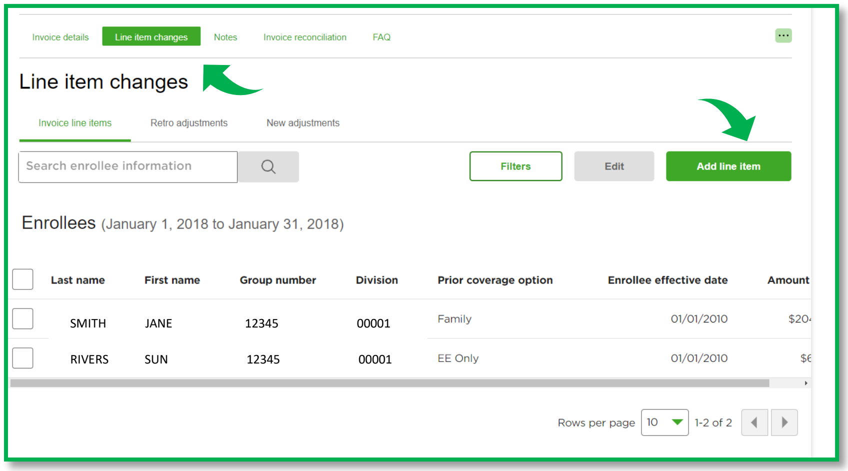
If coverage change related option is not selected, leave coverage option as is with no changes.

Enter in effective date of change.

Enter in adjusted amount applicable to your change and click on save.

Click on **Cancel** if you need to start over

Please note standard 90 retro applies. If you need to go beyond 90-day retro, please reach out to your Account manager and/or Billing representative. Also, any changes made here are for reconciliation purposes only. Ensure your eligibility system of record is also updated.



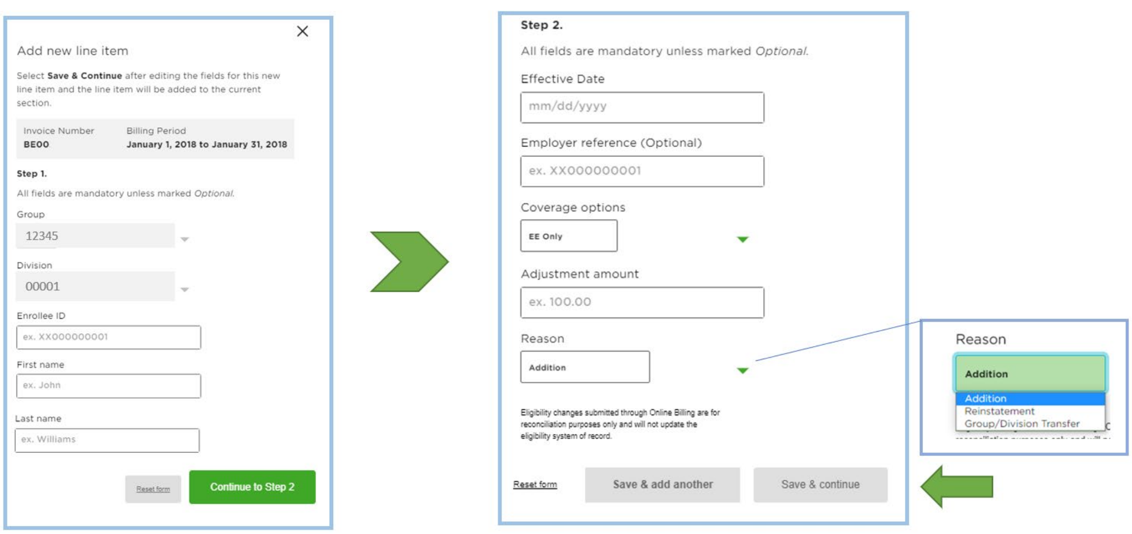

**How can I add enrollee details on a current invoice?**

To add an enrollee detail on an invoice you will have to first select the invoice from results screen and click on “line-item changes” from the top of the invoice detail screen.

You will be presented with a new screen with three additional tabs:

- Invoice line items: list of all current enrollees
- Retro adjustments: list of all retro activities (additions, terminations, and coverage changes)
- New Adjustments: list of all changes submitted for current invoice

Click on Add Line item.




New pop-up window will appear.

Follow the prompts to add new enrollee (enrollee ID, First name, Last Name) and click on **continue to step 2**

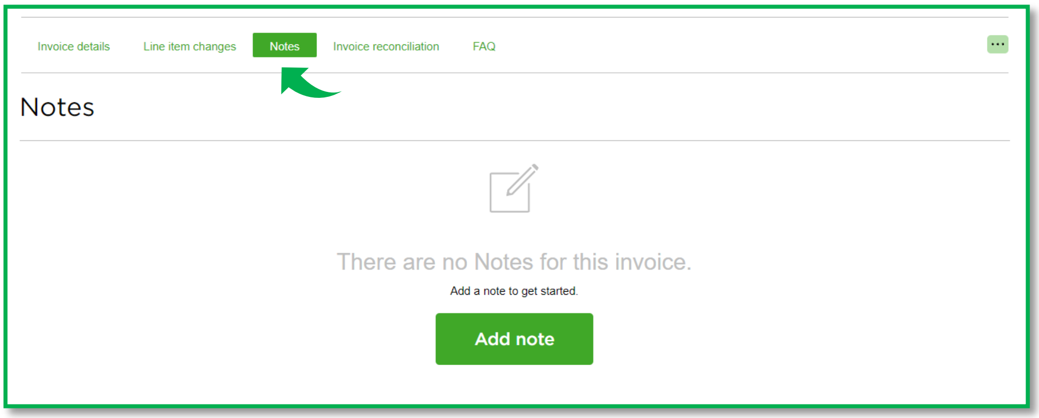
Follow the prompts again for second page (Effective date, Employer Ref, pick a coverage option, adjustment amount, and select reason for adding new enrollee)

Click on **Save & add another** or **Save & continue**

Click on **Reset form** if you need to start over

Please note standard 90 retro applies. If you need to go beyond 90-day retro, please reach out to your Account manager and/or Billing representative. Also, any changes made here are for reconciliation purposes only. Ensure your eligibility system of record is also updated.

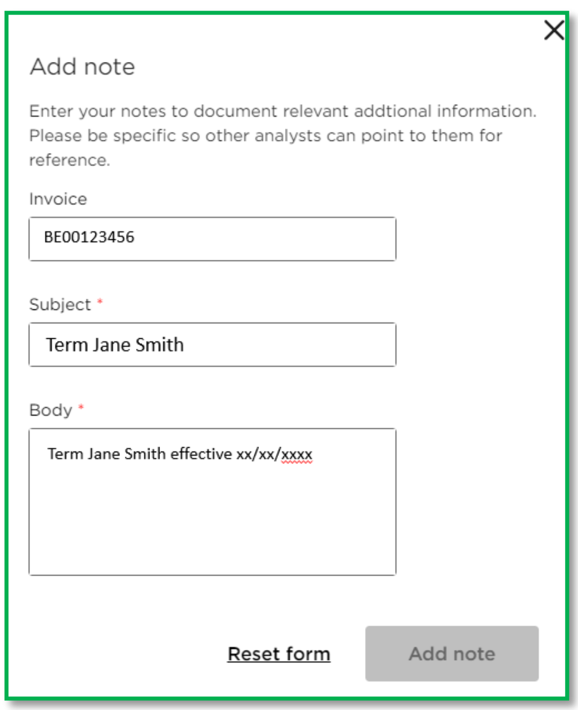
**How can I view and add notes associated with this invoice?**

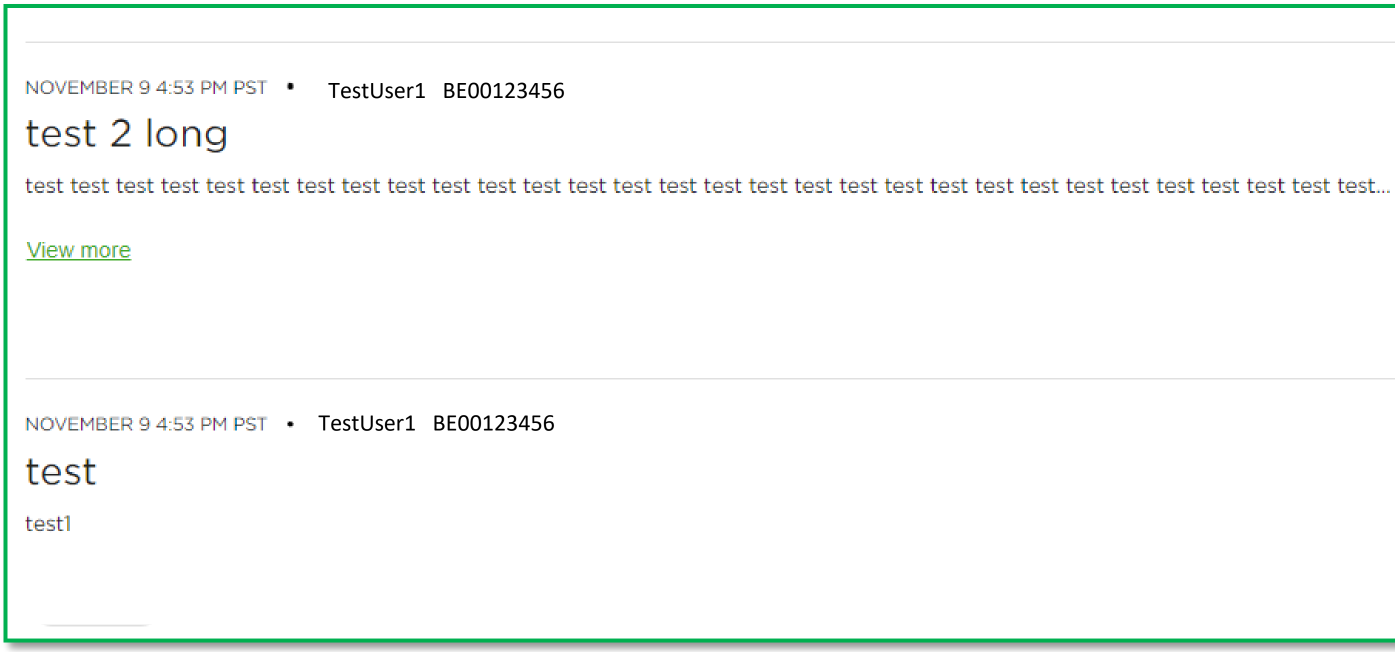



Click on **Notes** from the top panel from invoice screen.

If there are no notes available, click on **Add note** and complete the pop-up form.

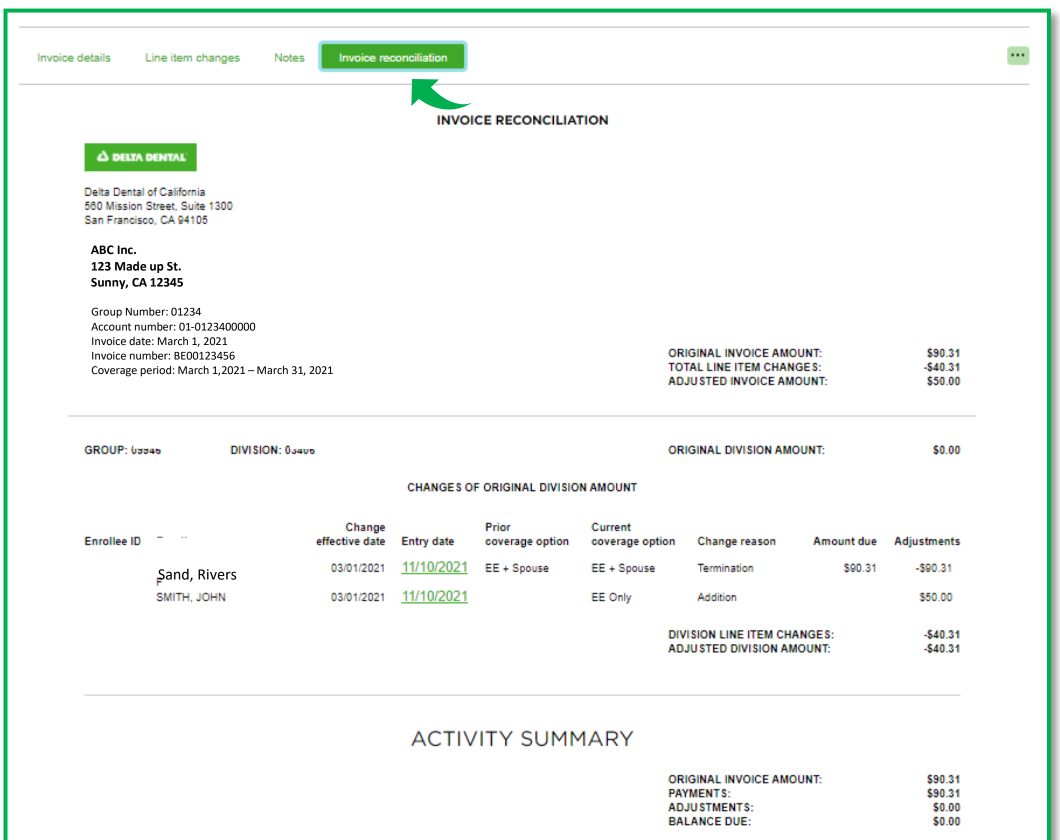
Once complete, click on **Add note** to save or **reset form** to clear and start over.






If you have existing notes or recently just added notes you will see them listed as above.

Click on **View more** if you would like to see beyond preview text display.



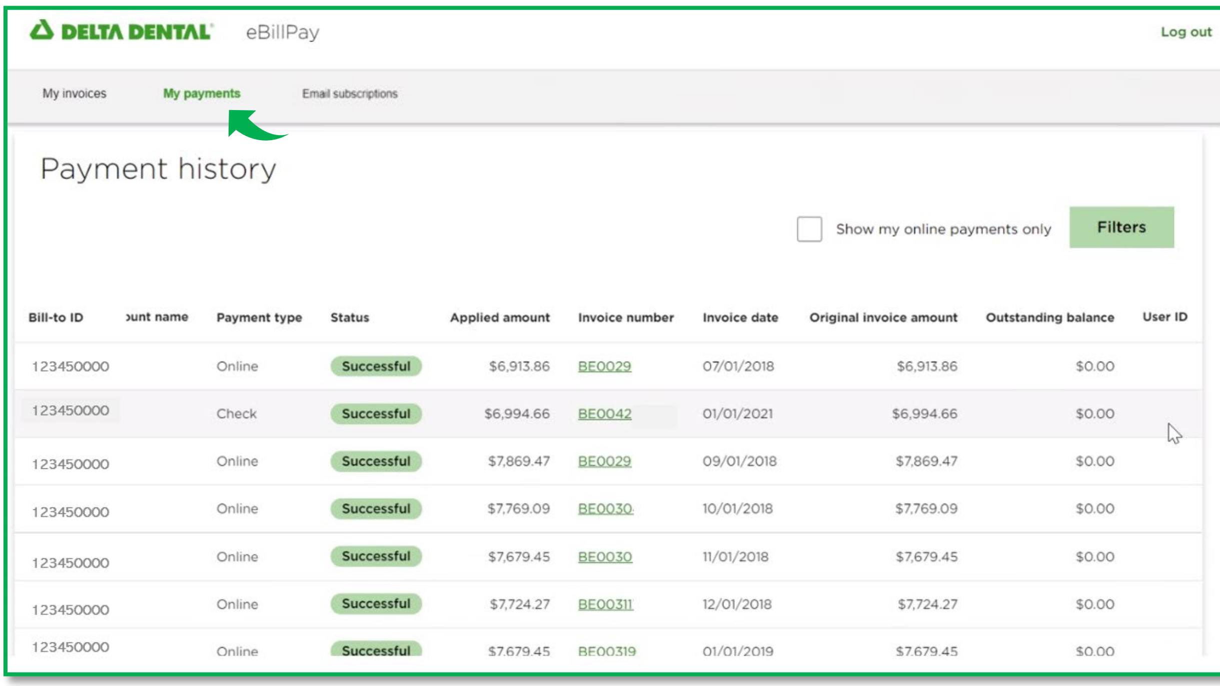
**How can I view the Invoice Reconciliation page?**

Click on **Invoice Reconciliation** from the top panel from invoice screen.

If you have not entered any line-item adjustments only Invoice information will appear with no details.

If you have already entered in line-item adjustments, all changes will appear under the appropriate division listing.

## Viewing Payments




**How can I view my payment history?**

To view your payment history, click on **My payments** at the top of navigation screen or at first log in click on **My payments** icon.

To sort the list of payments: Click the column header region of any of the following columns to sort the list of payments in ascending or descending order:

- Bill-to-ID
- Account name
- Payment type ( Check, EFT, Online etc)
- Status ( Successful, Processed, Pending, Rejected, Unsuccessful)
- Applied amount
- Invoice number
- Invoice date
- Original invoice amount
- Outstanding balance
- User ID if online payment

A little black arrow will appear pointing ▲ or ▼ to help indicate which column and order you are using to sort.
Click on Invoice Hyperlink to view invoice details.
Click on **filter** button to help refine your payment results page