

What services does InsuranceMenu Provide?

InsuranceMenu provides a collaborative agency quoting portal for Delta Dental of NJ/CT. Your Agency and its employees can configure proposals, save unlimited proposals per group, deliver them via InsuranceMenu, or download them to a desktop.

How can I access the InsuranceMenu Platform?

You can work with your Delta Dental Small Group Sales Executive, who will set up your registration on the portal. You will receive a one-time link that will enable you to create a password. Your username will be the email address on record with Delta Dental.

Is my link to access the platform personalized, or is it generic?

Once you are registered, you no longer need a personalized link. You can bookmark App.InsuranceMenu.com, where you will always have quick and easy access to your personal dashboard.

Are my quotes under my producer name or under my Agency?

Your quotes are organized under your profile within your agency. If you quote under two or more agencies (quoting under your own name and with another agency), you will work with your Delta Dental Small Group Sales Executive to set up your account to support this. In all cases, you will always be signed into your producer account.

Can I add additional users to my quoting portal? Is it self-serve, or do I need to contact someone to add a new user?

There is no limit to the number of users that you can add. Your Delta Dental Small Group Sales Executive will need to assist you with adding additional users to your portal.

Can users share usernames and passwords?

You should not share usernames and passwords. InsuranceMenu was designed to support many different agency operating models. Agency managers can quote on behalf of Agents, and custom teams can be set up to allow multiple users at the Agency to have access to quotes so that support can be shared.

How can I enter a group for quoting?

In the portal, select the button "+ Build Proposal" and follow the prompts to either select an existing group or create a new one. To create a new group, enter the Group Name and Zip Code.

How do I generate a quote?

Once you have created or selected a group, select dental or vision from the Product Details screen. On the Plan Criteria dialog box, choose the Group Size, SIC Code, and Contribution/Plan Type, and click "Save." You can then view all saved plans meeting the group criteria.

How do I generate a proposal?

Once you have viewed the available plans, you can add plans to your cart by selecting "Add to Proposal." Your cart is on the right side of the screen. When you are ready to generate a proposal, select "Save Proposal" in your cart. A window will appear where you can give your



proposal a unique name. This is an optional step for your convenience. Hit “Save,” and you will be directed to a page where you can generate or share this and other proposals.

Do I need demographic/census information to quote a group?

No; InsuranceMenu is designed to require minimal information to generate quotes for speed of quoting.

How long can I access a proposal?

InsuranceMenu will never delete your proposals, so you always have a history of your quoting activity.

Do I need to make a whole new proposal if the effective date changes?

It is a best practice to run new quotes to ensure the most accurate pricing and product choice for your client. Generating new quotes and creating new proposals is fast and easy.

How can I make changes to an existing proposal?

If you are not changing the effective date, you can clone an existing proposal. Select the proposal you want to edit and click “Edit Proposal.” This will NOT delete your current proposal but will make a copy so that you can modify, add, or remove plans. This allows you to keep track of changes over time and always have a history of what configurations you are presenting to your clients.

Can I generate a voluntary plan and a contributory plan in the same quote?

Yes. Once you have selected the plans for your proposal, you can edit your Rating Criteria by selecting the pencil icon at the top of the Browse Page. From there, you can change the contribution type. You can also now add the same plans with the new contribution type to your cart. When you save your proposal, you will see voluntary and contributory plans side by side.

Can I enroll my groups through the platform?

Not at this time.

How can I send a proposal to a broker, a client, or myself?

Once you have saved a proposal to your cart, select “Review and Confirm.” To email the proposal directly from InsuranceMenu, choose “Share Proposal,” enter a name and email address, and click “Send.” (NOTE: this is a system-generated email from no-reply@insurancemenu.com.) To save a PDF version of the proposal to your computer, click “Download Proposal.”

What do I do if the recipient does not receive a proposal sent through InsuranceMenu?

Contact Support@InsuranceMenu.com. If needed, you can download a PDF version of the proposal and email it directly to your client.

How can I access Benefit Summaries for each Small Group plan?

Benefit Summaries will be accessible through InsuranceMenu by mid-November 2024. If you need a Benefit Summary before then please contact your Small Group Sales Executive.



Plans that I used to quote are not available via InsuranceMenu. Are they still available?

Yes. If you are interested in quoting a plan that you do not see available in InsuranceMenu, please contact your Delta Dental Small Group Sales Executive.

Is there a help line for technical issues or quoting issues?

Yes. Please email Support@InsuranceMenu.com.

My Delta Dental Small Group Sales Executive normally quotes my groups. Can I still work with them, or do I need to use the portal to get quotes?

You can still request quotes and proposals from your Delta Dental Small Group Sales Executive at any time.

Is my commission tracked through InsuranceMenu?

No. For questions regarding commissions, please contact Commissions@DeltaDentalNJ.com.

Will renewals be accessible in the InsuranceMenu portal?

Not at this time. Please contact your Small Group Account Manager for assistance with renewals.

How can I secure a quote or proposal for an existing group looking for renewal alternatives?

Please contact your Small Group Account Manager for assistance with all renewal quoting options.

How does an agency or a registered user terminate a user from their profile?

Contact your Delta Dental Small Group Sales Executive for assistance.