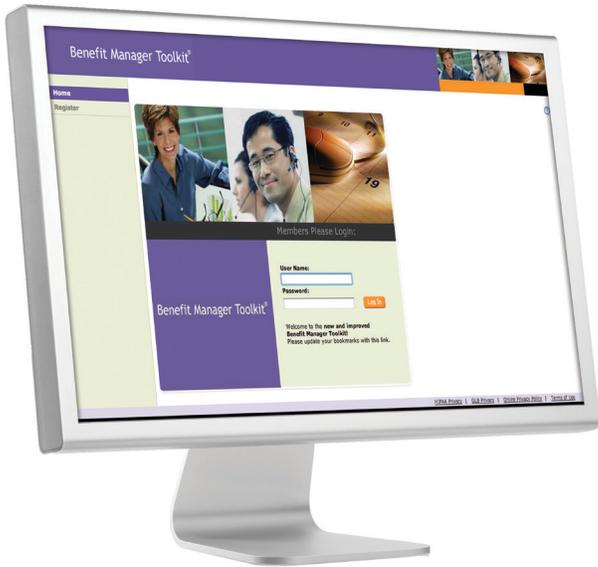


# Quick Reference: Benefit Manager Toolkit



## Log In

- Get Username and Password from your Account Manager
- Go to [www.ToolkitsOnline.com/BMT](http://www.ToolkitsOnline.com/BMT)
- Enter your Username in the box labeled 'User Name'
- Enter your password in the box labeled 'Password'
- Click **Log In**

## View Coverage History

- Click on **Dental Benefit Manager**
- Click on **Inquiry**
- Enter Member ID or First & Last Name and DOB; click **Search**
- Click on the words next to 'Coverage Type'
- Click on **View History**

## Client & SubClient Authorizations

- Click on **Dental Benefit Manager**
- Click on **View SubClient Authorizations**

## Member Inquiry

- Click on **Dental Benefit Manager**
- Click on **Inquiry**
- Enter Member ID or First & Last Name and DOB; click **Search**
- Click on the member's name

## Print ID Cards

- Click on **Dental Benefit Manager**
- Click on **Inquiry**
- Enter Member ID or First & Last Name and DOB; click **Search**
- Click on **Print Card**

## Transfer Members with Clients & SubClients

- Click on **Dental Benefit Manager**
- Click on **Inquiry**
- Enter Member ID or First & Last Name and DOB; click **Search**
- Click **Transfer**
- On the **Client/SubClient Selection** screen, select the Client to which the member should be transferred
- The **Member Transfer** screen appears; fill in the information
- If the member has dependents listed, select which should be transferred with the member
- Select **Update**

**NOTE:** Any dependents not transferred are termed as of the transfer date.

## Add Member

- Click on **Dental Benefit Manager**
- Click **Add**
- Enter the new Member ID
- Click **Add**
- Select the **Client** and **SubClient** to which the member should be added
- Fill in the member information; required fields are in red
- Click **Submit**

## Add Dependent

- On the Family Composite screen, click **Add Dependent**
- Fill in dependent information; required fields are in red
- Click **Submit**

## Update Member/Dependent Information

- Click on **Dental Benefit Manager**
- Click on **Update**
- Enter the Member ID and click **Search**
- Select **Update** next to the member whose information should change
- Modify member information as necessary
  - To terminate member eligibility:
    - Change 'Eligibility Status' to **Inactive**
    - Enter the date of termination into 'Eligibility Effective Date'
  - To reinstate member eligibility:
    - Change 'Eligibility Status' to **Active**
    - Enter the date of reinstatement into 'Eligibility Effective Date'
    - Reinstate dependents, if needed
- Click **Update**

## Client Benefits

- Select **Client Benefits** from the menu bar
- Enter the Client and click **Search**
- Enter SubClient information, if needed
- Enter Member Type, if needed
- View the name of the benefit program, the Plan, the coverage percentages, waiting periods, etc.
- Click on the blue diamonds to view subcategories

**Questions? Contact your Account Manager or the Rapid Response Team**

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