

Quick Reference: Benefit Manager Toolkit



Log In

- Get Username and Password from your Account Manager
- Go to 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**

Merge Person	Name	Birth Date	Dependent Type	Eligibility Status	Eligibility Effective Date	Special Attribute	Options
-	Jane Smith	02/29/1983	-	Inactive	01/01/2014		

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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