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’
  - Reinstall 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**