Delta Dental of Minnesota
Benefit Manager Toolkit®
Quick Guide

**Client Admin**

- How to Register  
  Page. 2
- Create a Delegate  
  Page. 4
- Add a User  
  Page. 5
- Update a User  
  Page. 6

**Enrollment**

- Add a Member  
  Page. 7
- Terminate a Member  
  Page. 9
- Reinstate a Member  
  Page. 10
- Add a Family  
  Page. 11
- Add Dependant  
  Page. 13
- Transfer a Family  
  Page. 14
- Print ID Card  
  Page. 16
Collect all of the information needed for registration. There are three pieces of information needed to complete the registration process:

1. The authorization code received in an email from DoNotReply@mydeltadental.com
2. The email address that the authorization code email was sent to
3. Your Client ID
   - The Client ID is your 6 digit group number
   - It can be found on mail and email communications from Delta Dental of Minnesota
   - It may also be referred to in contract or summary plan description documents that you received from Delta Dental of Minnesota
   - If you do not know your Client ID, please contact us at clientsuperuser@deltadentalmn.org

2. Using the above information, fill in the correct fields on the registration page.

3. Create a new account including Username, password and account recovery challenge question.
4. Once you have completed the registration process, click on Home in the left navigation menu.

Login using your newly created credentials.

5. Accept the access agreement.

Once on the home page, you may access the toolkits functionality by expanding the left hand navigation menu.

**Client Admin** will provide access to add and update users within your organization that need access to the portal.

**Dental Benefit Manager** will provide access to enrollment, client benefits, billing and more.
1. Click **Client Admin** to access features of the BMT. In the expanded menu, click **Create User**.

2. Enter the new delegate’s information and select “Create Delegate” under Application Access. Click **Next**.

3. Verify that the new delegate’s information is correctly populated. Click **Create User**.

4. You can now provide the new user with their username and password.
How to add a user

1. Click **Client Admin** to access features of the BMT.
   
   In the expanded menu, click **Create User**.

2. Enter the new user’s information and select the correct SubClient option.
   
   Click **Next**.

3. Verify that the new user’s information is correctly populated.
   
   Click **Create User**.

4. You can now provide the new user with their username and password.
Benefit Manager Toolkit® Quick Guide

How to update a user

1. Click **Client Admin** to access features of the BMT.
   
   In the expanded menu, click **Manage User**.

2. You can choose to manage both the user information as well as user authorizations.

**Manage User** allows you to manage the user’s name, company name, email address and login capability.

Once the information is correct, click **Update** to apply changes.

**Manage Authorizations** allows you to manage the user’s authorizations and sub-clients.

Once the information is correct, click **Update** to apply changes.
How to add a member

1. Click **Dental Benefit Manager** to access features of the BMT.

   In the expanded menu, click **Add**.

2. Enter the member's Social Security number and click **Add**.

3. Select Client ID from the drop down menu and click **Search** to add a member.

4. Set the Sub-client from the drop down menu (previously called sub group).
5. Enter the member’s Information and click Update.

6. The member information will now populate.
Benefit Manager Toolkit® Quick Guide

How to terminate a member

1. Click Dental Benefit Manager to access features of the BMT.

   In the expanded menu, click Update.

2. Enter the member's ID number and click Search.

   Select the member you wish to terminate and click Update.

3. Under Eligibility Status, select Inactive.

   In the Eligibility Effective Date field, enter the date you wish coverage to end. This date is the 1st day without coverage and click Update.

4. The member will now show up as inactive status.
1. Click **Dental Benefit Manager** to access features of the BMT.

   In the expanded menu, click **Update**.

2. Enter the members ID number and click **Search**.

   Select the member to reinstate.

3. Select **Update** on the correct member.

4. Under **Eligibility Status**, change to active and enter the **Eligibility Status Reason**.

5. The member will now show as active eligibility status.
Benefit Manager Toolkit® Quick Guide

How to add a family

1. Click Dental Benefit Manager to access features of the BMT. In the expanded menu, click Family Enrollment.

2. Select the Sub-client.

3. Enter the plan information.

4. Enter the member’s Social Security number.

5. Enter the member’s information and click Update at the bottom of the page.
6. You will receive a prompt that notifies that family enrollment was created successfully.

7. If you would like to add a dependent, follow steps 1 - 3 and click **Add Dependent** on the bottom of the member information page.

   Click **Update** at the bottom of the page once all dependent information has been entered.

8. You will receive a prompt that notifies that family enrollment was created successfully.

9. Family information will display when searching on member ID.
Benefit Manager Toolkit® Quick Guide

How to add a dependent

1. Click Dental Benefit Manager to access features of the BMT. In the expanded menu, click Update.

2. Enter the Subscriber’s ID Number and click Search.

3. Select Add Dependent link.

4. Enter the dependent information and click Update.

5. The newly added dependent will display under the subscriber.
How to transfer a family

1. Click **Dental Benefit Manager** to access features of the BMT.
   
   In the expanded menu, click **Update**.

2. Enter the members ID number and click **Search**.
   
   Select the member to transfer.

3. Select **Transfer** under the member listing.

4. Select the Client ID and the Sub-client ID.
5. Select any other members on the plan that need to be transferred if applicable.

6. The system will now display new Client and Sub-client numbers.
Benefit Manager Toolkit® Quick Guide

How to print a ID card

1. Click Dental Benefit Manager to access features of the BMT.

   In the expanded menu, click Update.

2. Enter the member's ID number and click Search.

3. Select the correct user.

4. Select Print Card option below the member information.

5. From your web browser, print the ID Card screen.