PRODUCER TOOLKIT MANUAL

DELTA DENTAL®

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How to Log In to Producer Toolkit (New Admins)

Once an Admin has been created within Roosevelt Producer Admin for an Agent or Agency, they will get a welcome email indicating that they have been designated as a Producer Toolkit Admin.

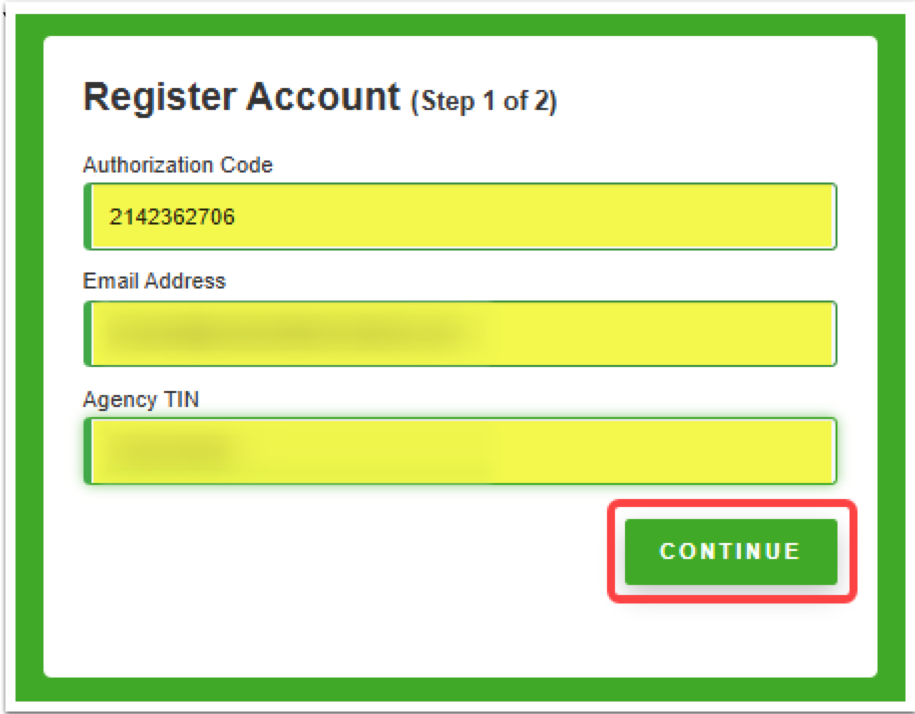
If a Producer Toolkit Admin is already a BMT Admin, this email registration process is not needed. When a Toolkit Admin has authorizations in both Benefit Manager Toolkit (BMT) and Producer Toolkit, they will be able to seamlessly switch between the applications using their existing login. See How to Switch from Producer Toolkit to BMT for more information.

This email will:

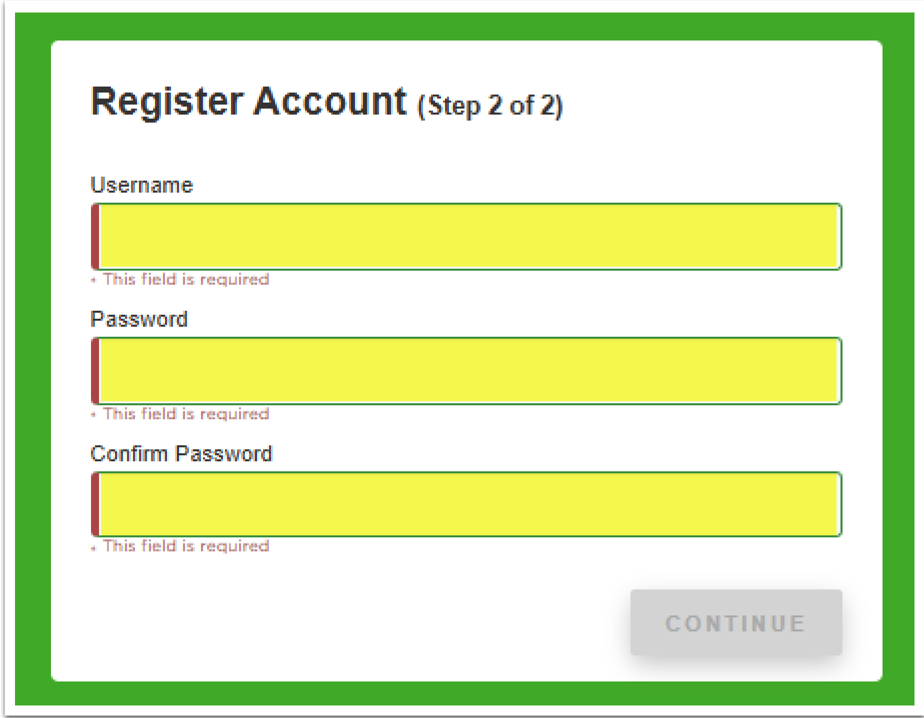
- Provide an Authorization Code.
- Notify the new Admin that they will need their email address to complete registration.
- Notify the new Admin that they will need their Agency's TIN or Agent's SSN to complete registration.
- Provide a link to the registration page (Delta Dental Agency level example is shown below).

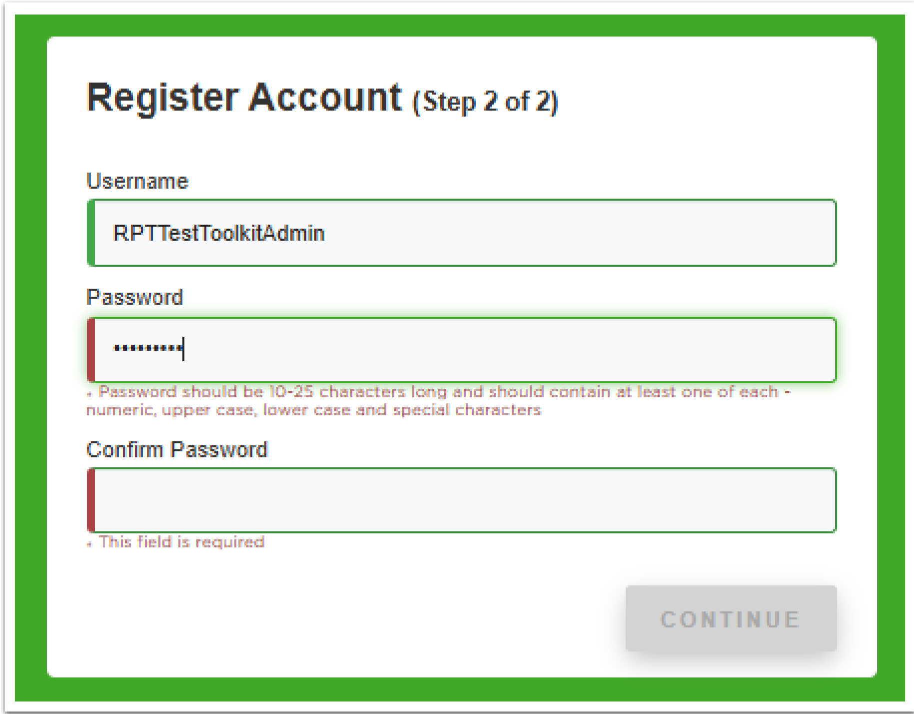
1. Click the registration link provided in your welcome email to begin setting up your account.

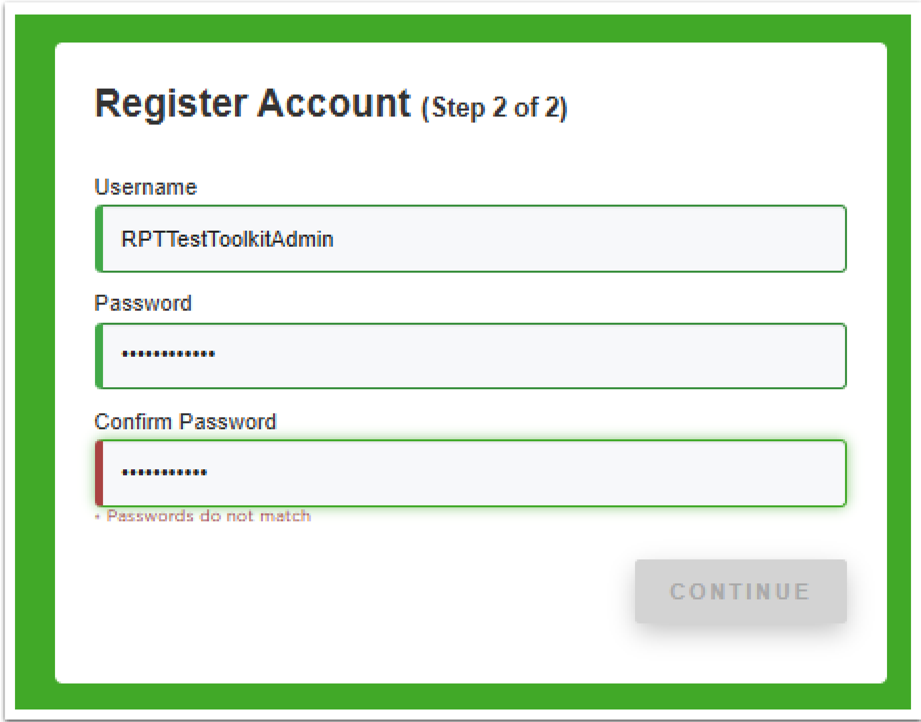
2. Enter your Authorization Code, Email Address, and Agency TIN or Agent SSN to complete the required fields, then Click CONTINUE.

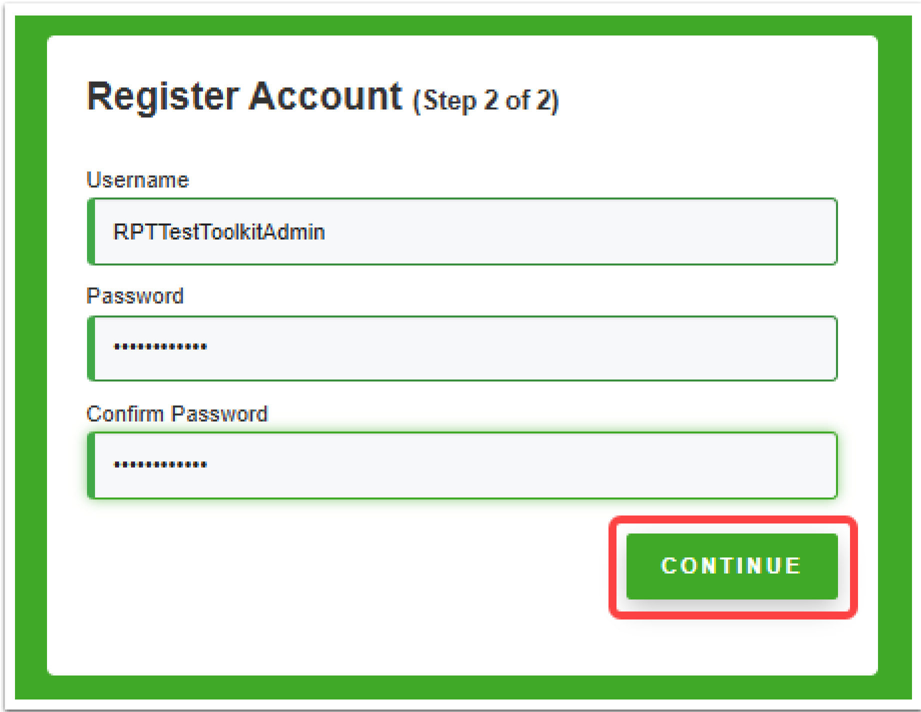


3. Create your Username, Password, Confirm your Password, then Click CONTINUE.

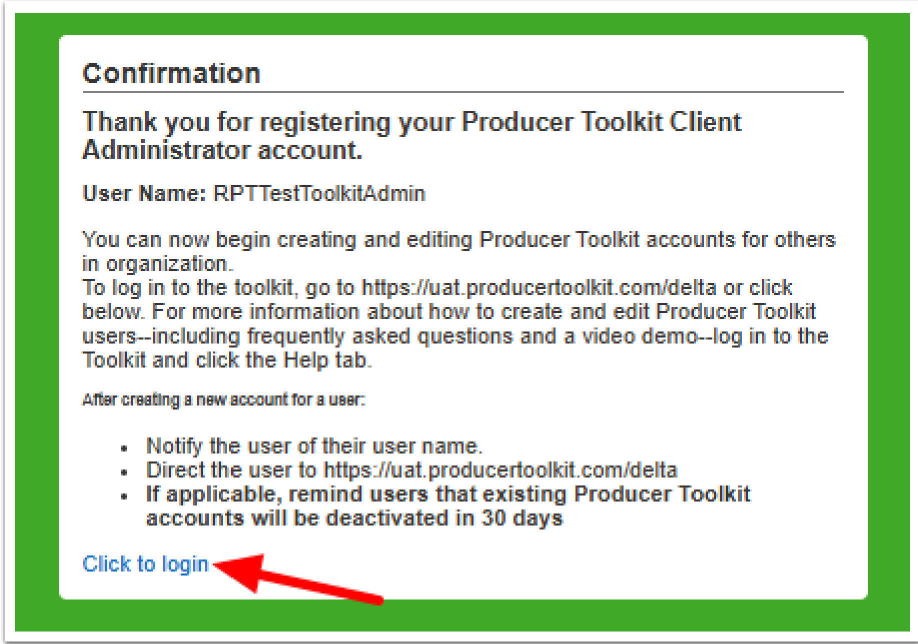




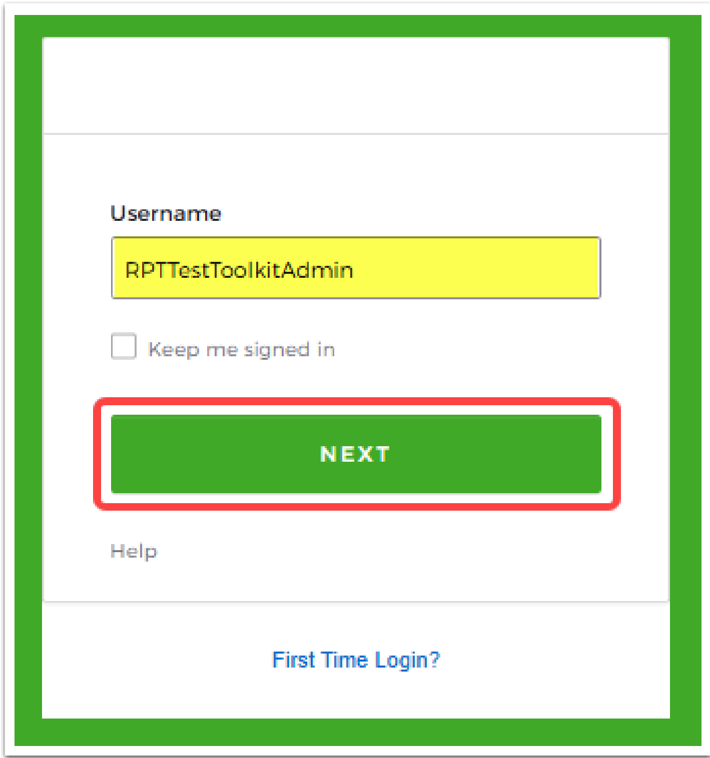

Register Account (Step 2 of 2)
Username
RPTTestToolkitAdmin
Password
Confirm Password
Passwords do not match
CONTINUE


Register Account (Step 2 of 2)
Username
RPTTestToolkitAdmin
Password
Confirm Password
CONTINUE

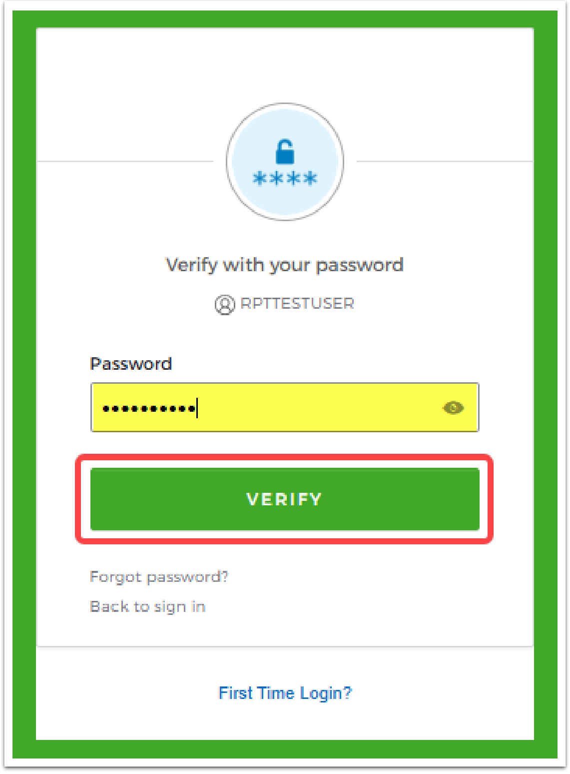
4. Review your Confirmation, then select Click to login.



5. Enter the Username that you created in step 3, then Click NEXT.



6. Enter the Password that you created in step 3, then Click VERIFY.



You will then be logged in to Producer Toolkit.

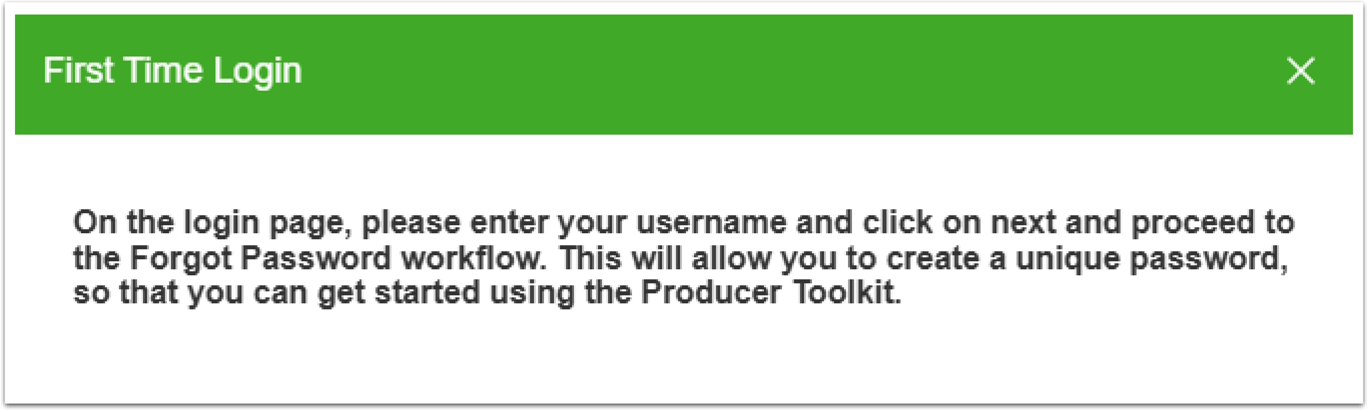
How to Log In to Producer Toolkit (New Users)

Once a User has been created within Producer Toolkit, they will get a welcome email indicating that someone has created an account on their behalf.

If a Producer Toolkit User is already a BMT User under the same Toolkit Admin, this email registration process is not needed. When a Toolkit User has authorizations in both Benefit Manager Toolkit (BMT) and Producer Toolkit, they will be able to seamlessly switch between the applications using their existing login. See How to Switch from Producer Toolkit to BMT for more information.

This email will:

- Notify the new user that they need to get their Username from the person who created their account.
- Provide a link to the login page.
- Notify the new user that they should use the ‘First Time Login?’ workflow with their assigned Username.



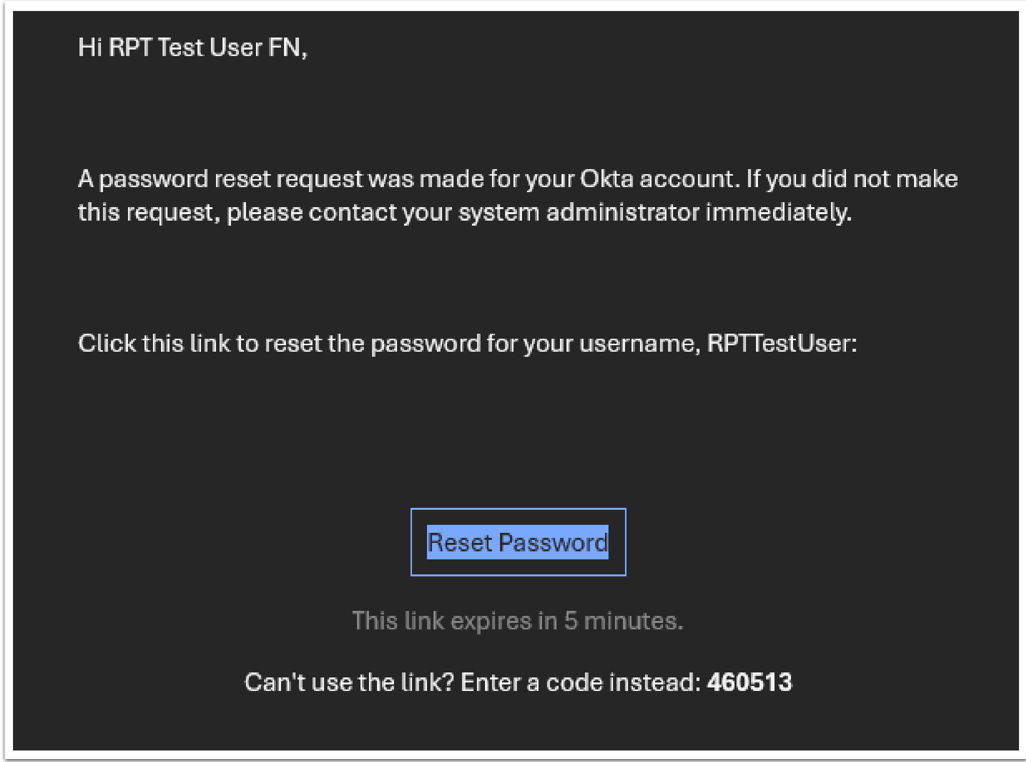
Here they will start a workflow to create a password.

1. Enter the assigned Username in the Username field and Click NEXT.

2. Click Forgot password?

3. Click SEND ME AN EMAIL.

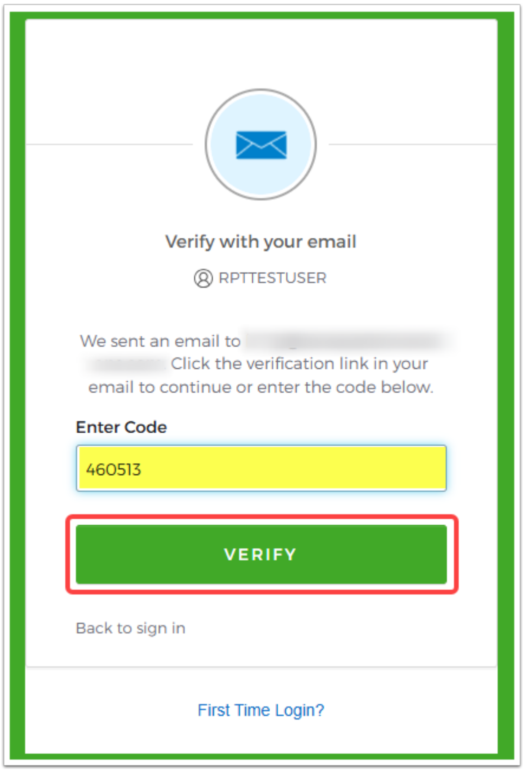
An email is sent to the email address on file containing a link and code that is valid for 5 minutes.



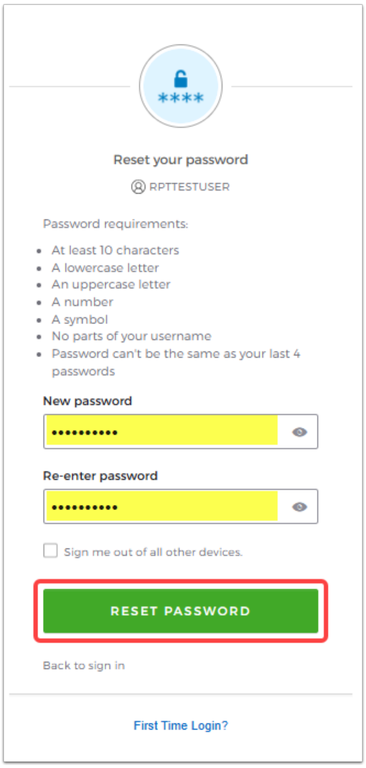
4. Click Enter a verification code instead.

Alternatively, you may use the link provided in the email to verify.

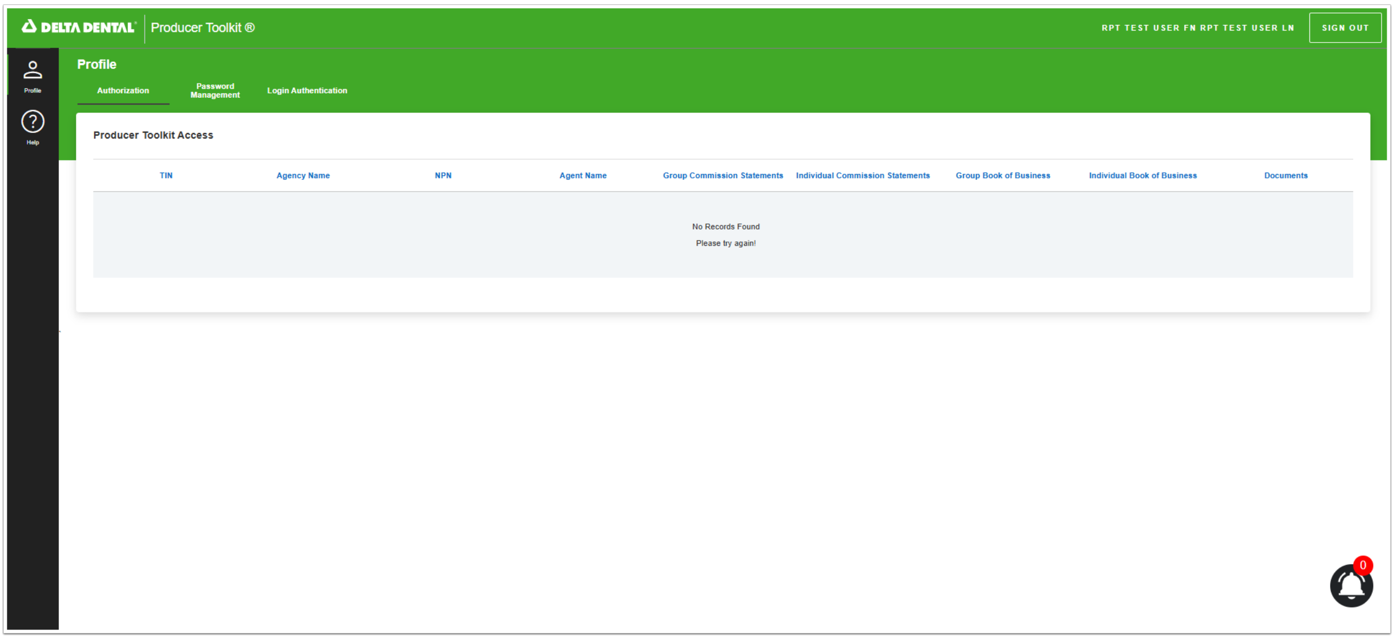
5. Enter Code and click VERIFY.



6. Enter a New password, Re-enter password, and Click RESET PASSWORD.



The new user is logged in.

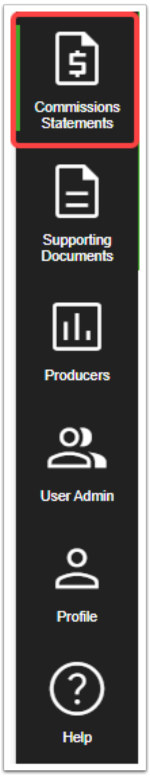


How to Search for and Download Commissions Statements in Producer Toolkit

You can search for and download Commissions Statements in Producer Toolkit by following the walk-through below.

You will need authorizations for Individual or Group Commissions Statements to view this tab.

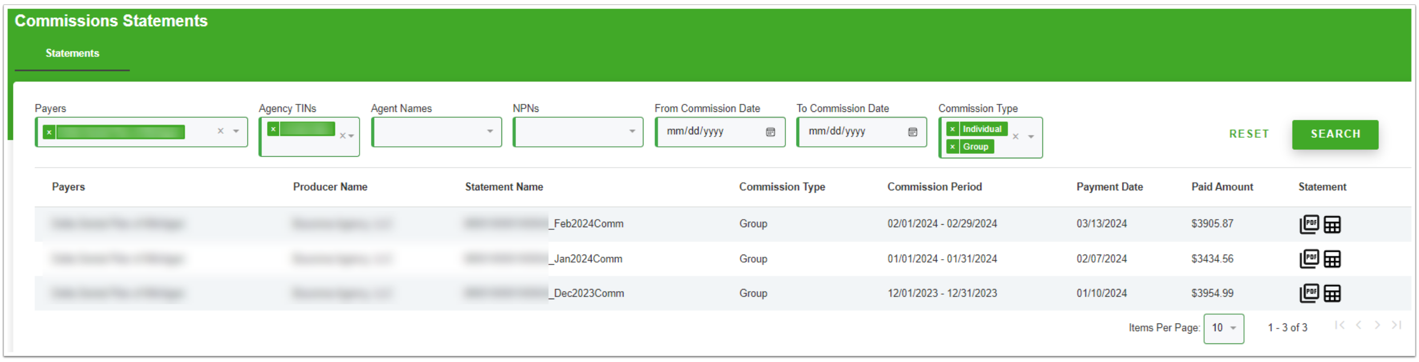
Select Commissions Statements in the left navigation menu.



Your left navigation menu options will be based on your authorizations and may not be displayed as shown.

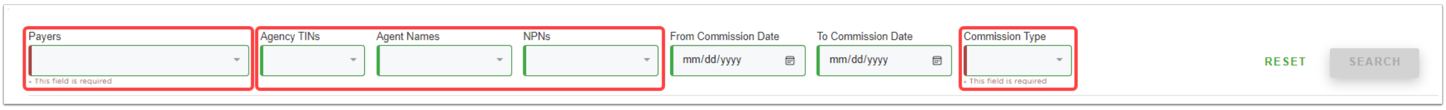
Based on your authorizations, a search is completed automatically upon landing on the page.

A list of search results will be displayed below the search parameters in descending order by Commission Period.



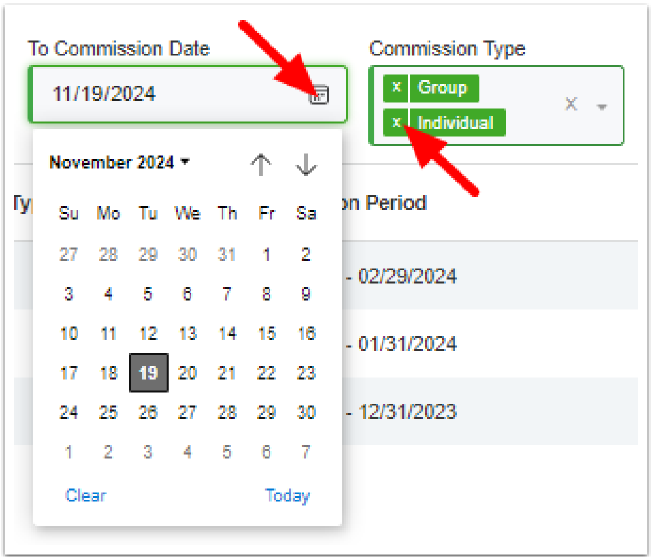
If your result set is large, you may change the # of Items Per Page in the lower right corner.

At least one Payer, Commission Type, and *either* Agency TIN OR Agent Name OR NPN are required. The Payers you have access to will be populated by default, and both Individual and Group Commission Types are selected by default if you have authorizations for both.

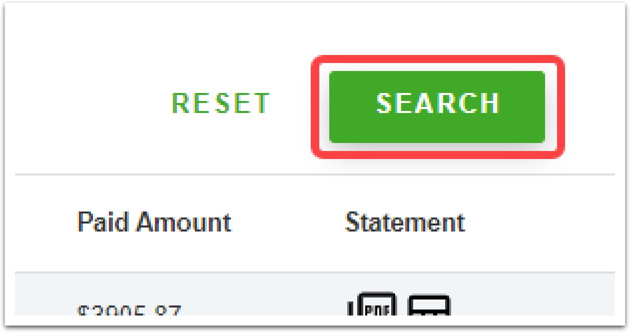


Adjust criteria to further limit your search results.

You may adjust your search criteria by entering From and/or To Commission Dates, or by removing any default selections from search fields by clicking the x related to a selection.

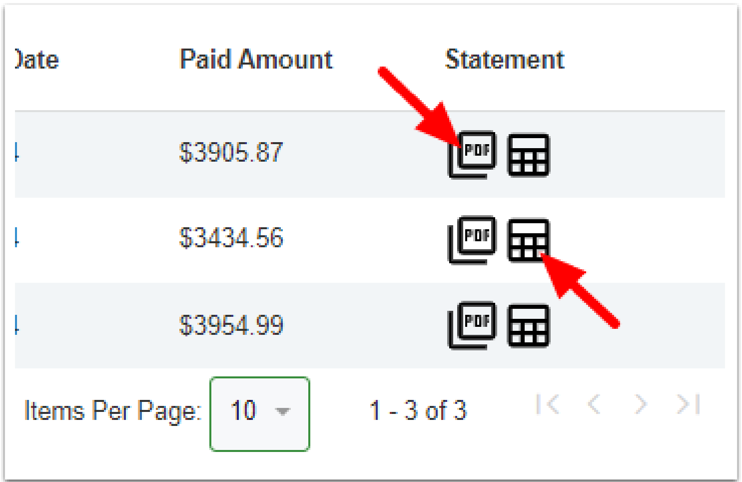


Click SEARCH to display updated results.



Click RESET to return to your default selections and refresh your search results.

To Download a Commissions Statement, click the PDF or Excel icon in the Statement column for that record.

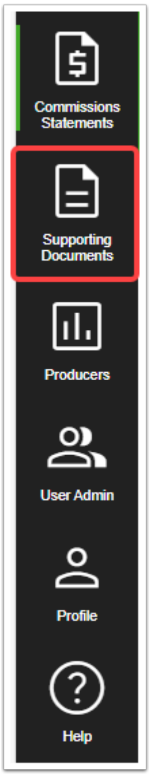


How to Search for and Download Supporting Documents in Producer Toolkit

You can search for and download Supporting Documents in Producer Toolkit by following the walk-through below.

You will need Documents authorizations to view this tab.

Select Supporting Documents in the left navigation menu.



Your left navigation menu options will be based on your authorizations and may not be displayed as shown.

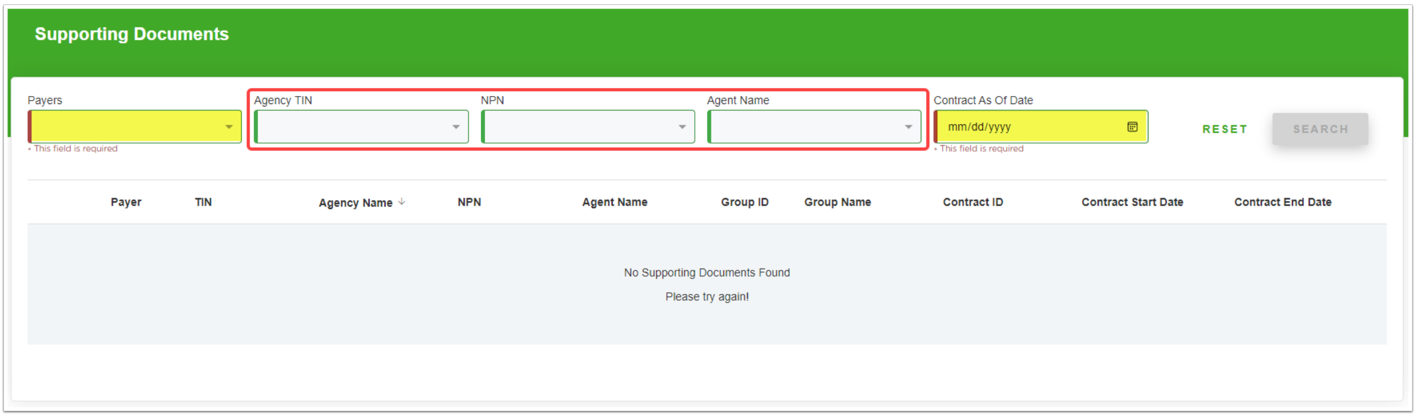
Based on your authorizations, a search is completed automatically upon landing on the page.

A list of search results will be displayed below the search parameters. Based on your authorizations, you may have access to Documents for Groups under multiple Producers, or you may have access to only your own Groups' Documents.

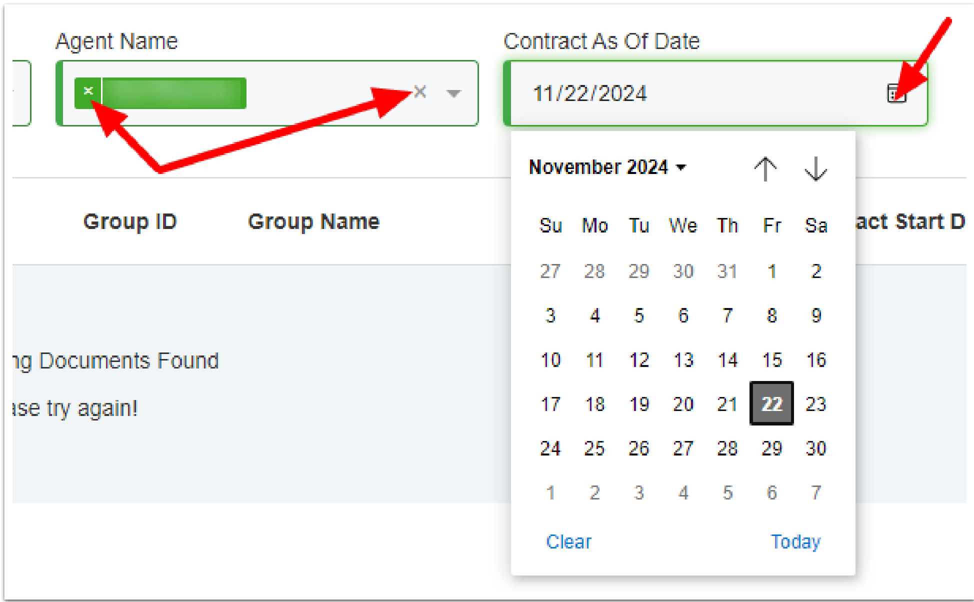
> Once you have completed a search, your Contract Level results will be displayed below the Search parameter fields.

Adjust criteria to further limit your search results.

Payers, Contract As Of Date, and *either* Agency TIN OR Agent Name OR NPN are required. Payers you have access to will automatically populate, and the Contract As Of Date will default to the current system date.

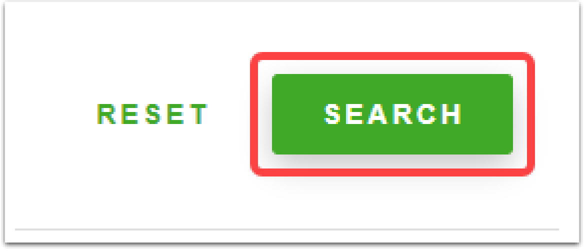


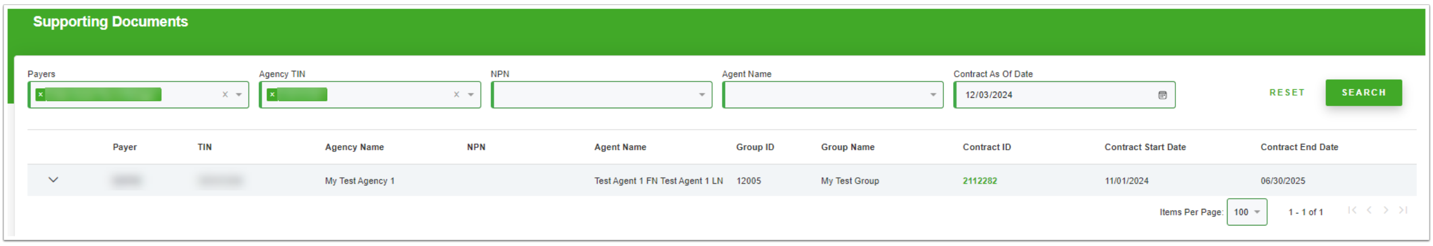
You may adjust your search criteria by selecting a different Contract As Of Date, or by removing any default selections from search fields by clicking the x related to a selection.



Click RESET at any time to return to your default selections and refresh your search results.

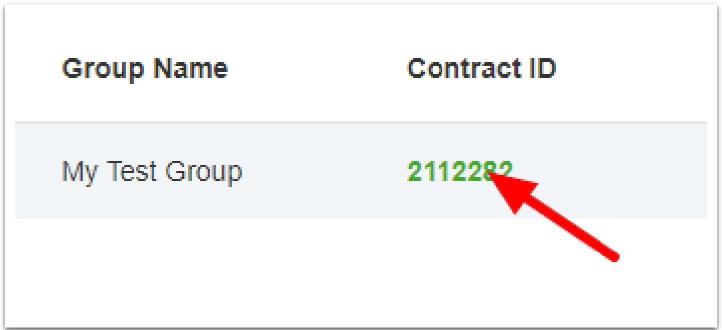
Click SEARCH to display updated results.



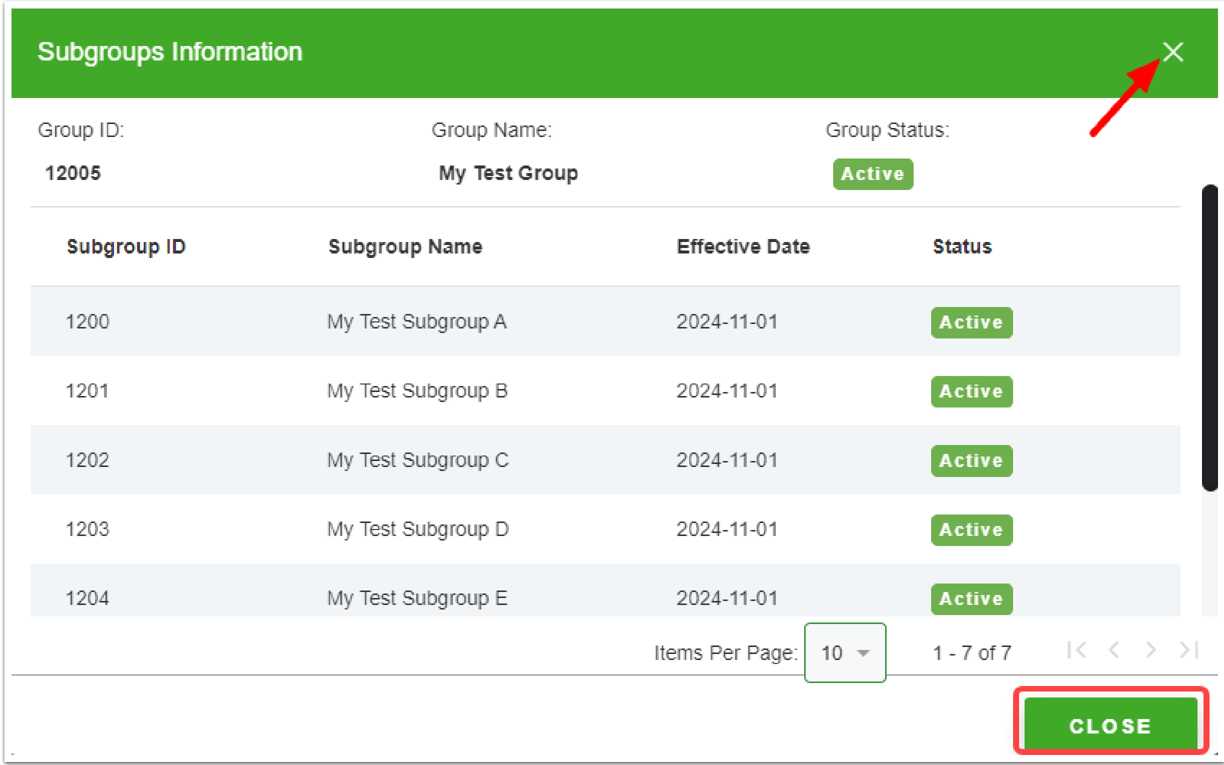


If your result set is large, you may change the # of Items Per Page in the lower right corner.

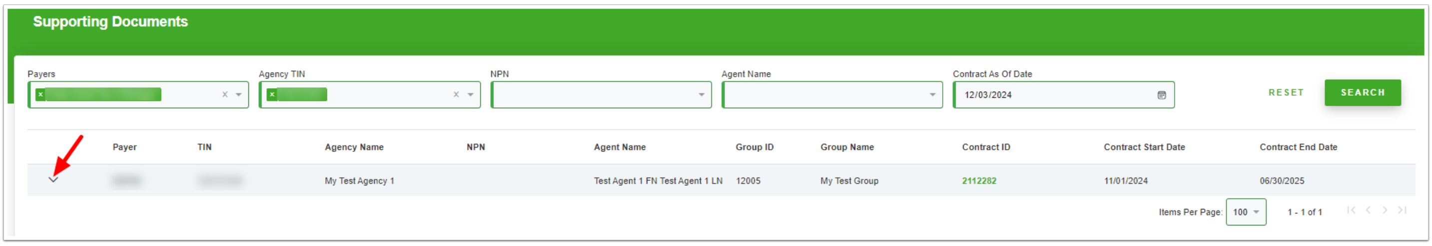
Click the Contract ID for your record to view Subgroups Information included within that Contract.



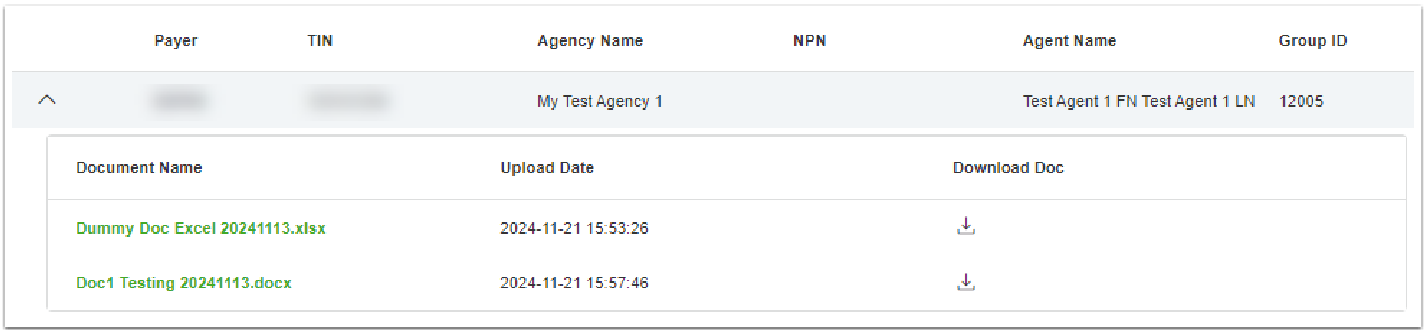
Click the x in the top right corner or click CLOSE to close the Subgroups Information popup.



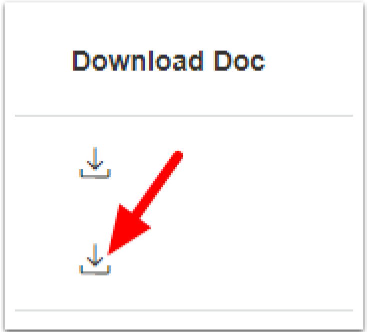
Click the caret to the left of a given Contract Level record to display the Document Level drop down results for that Contract.



Here you can view a Document's Name and Upload Date, and Download the Document.



Click the download icon in the Download Doc column for your record to download the Document to your computer.



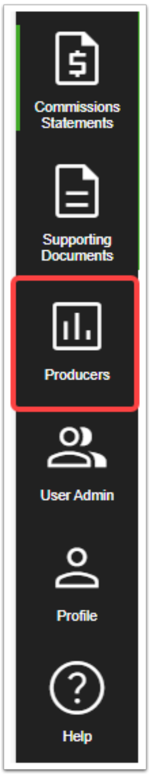
If you are having trouble downloading a Document, check your settings to ensure that your popup blocker allows downloads from the Producer Toolkit site.

How to Search for Producers and Export Book of Business in Producer Toolkit

You can search for Producers and export Book of Business in Producer Toolkit by following the walk-through below.

You will need Individual Book of Business and/or Group Book of Business authorizations to view this tab.

Select Producers in the left navigation menu.



Your left navigation menu options will be based on your authorizations and may not be displayed as shown.

Based on your authorizations, a search is completed automatically upon landing on the page.

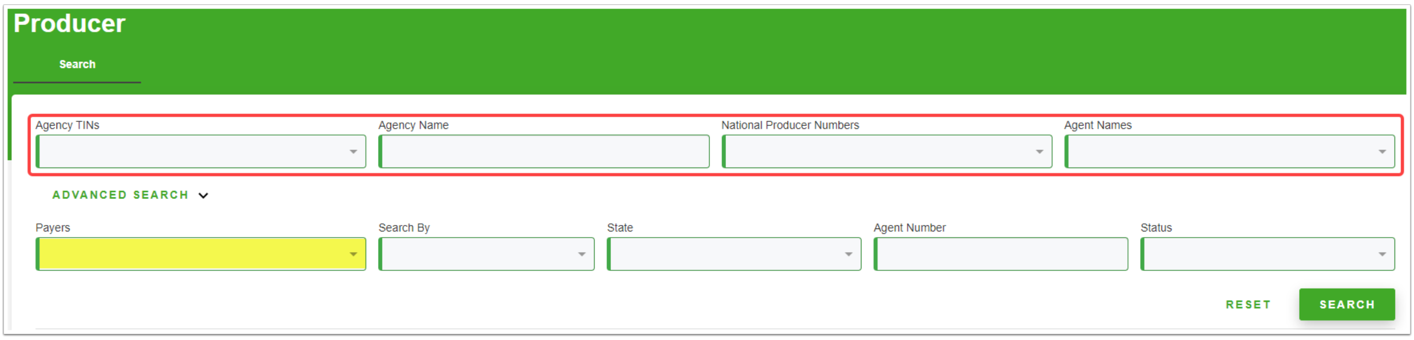
A list of search results will be displayed below the search parameters. Based on your authorizations, you may have access to Book of Business for multiple Producers, or you may have access to only your own Book of Business.

Once you have completed a search, your results will be displayed below the Search parameter fields.

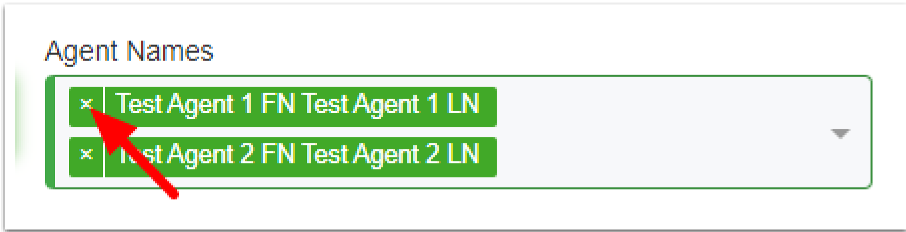
Adjust criteria to further limit your search results.

Payers, and *either* Agency TIN <u>OR</u> Agency Name <u>OR</u> NPN <u>OR</u> Agent Name are required. Payers and Agent or Agency information you have access to will automatically populate, and the Status will default to Active.

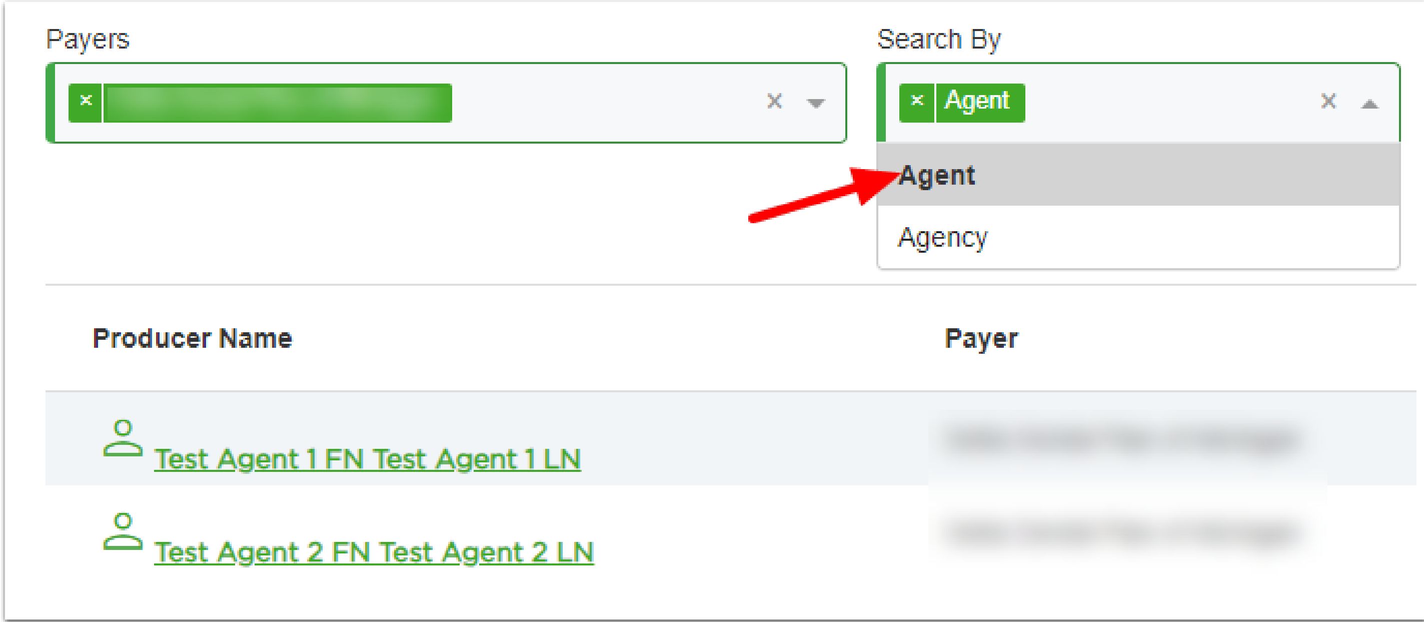
Click ADVANCED SEARCH to view additional Search fields.



You may adjust your search criteria by selecting different criteria, or by removing selections from search fields by clicking the x related to a selection.

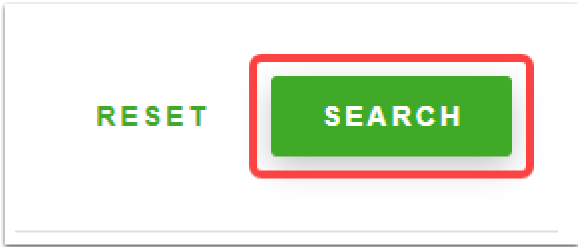


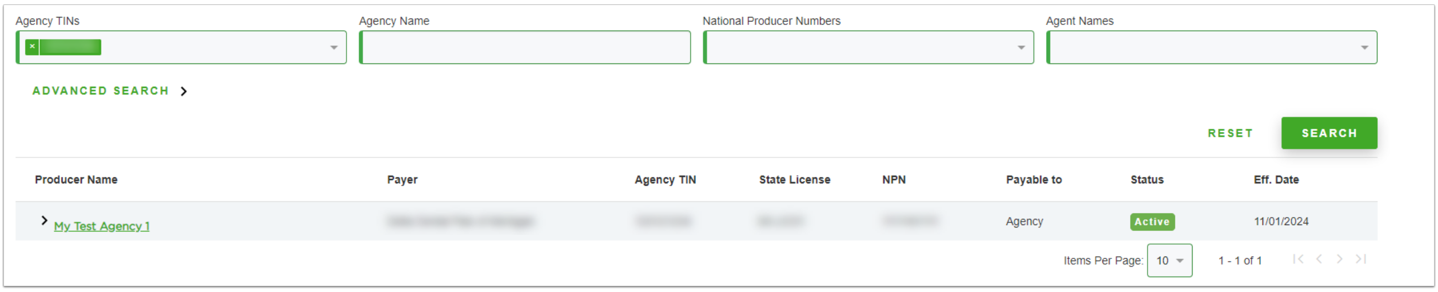
Select a value in Search By to limit your results to only Agents or only Agencies.



Click RESET at any time to return to your default selections and refresh your search results.

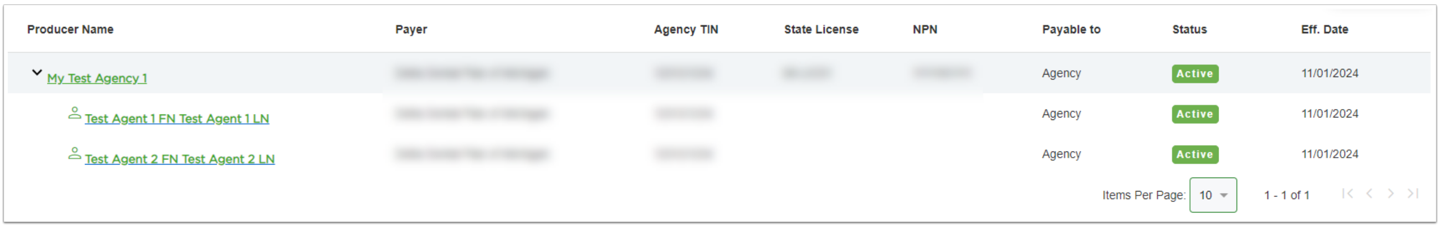
Click SEARCH to display updated results.





If your result set is large, you may change the # of Items Per Page in the lower right corner.

Click the caret to the left of a given Producer record to display the Agent Level drop down results for that Agency.



Producer Name	Payer	Agency TIN	State License	NPN	Payable to	Status	Eff. Date
My Test Agency 1	[illegible]	[illegible]	[illegible]	[illegible]	Agency	Active	11/01/2024
Test Agent 1 FN Test Agent 1 LN	[illegible]	[illegible]			Agency	Active	11/01/2024
Test Agent 2 FN Test Agent 2 LN	[illegible]	[illegible]			Agency	Active	11/01/2024

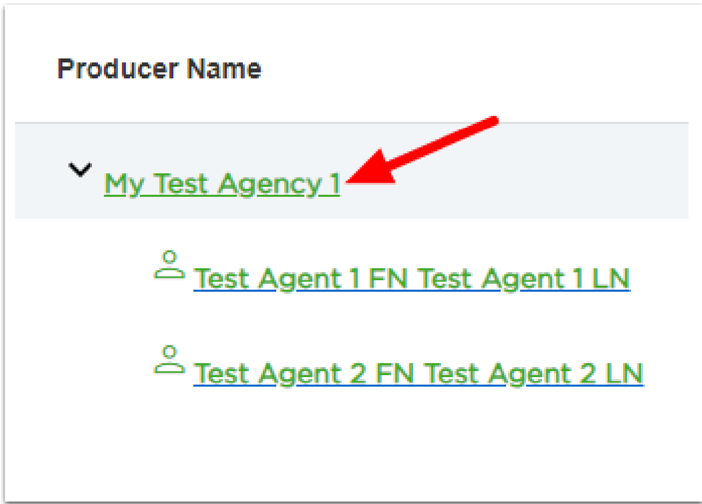
Items Per Page: 10 1 - 1 of 1

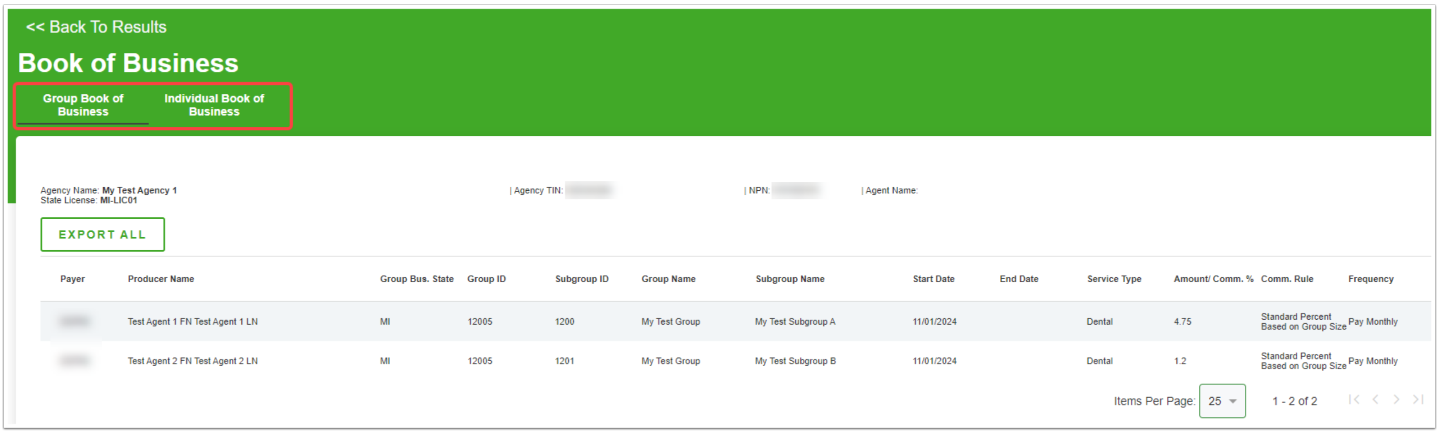
Agent Level Producers are denoted by a person icon displayed to the left of the Producer Name.

Click on a Producer Name to view Book of Business.

Group Book of Business and Individual Book of Business tabs will be displayed if you have authorizations to view both. You may click back and forth between the two tabs as needed.

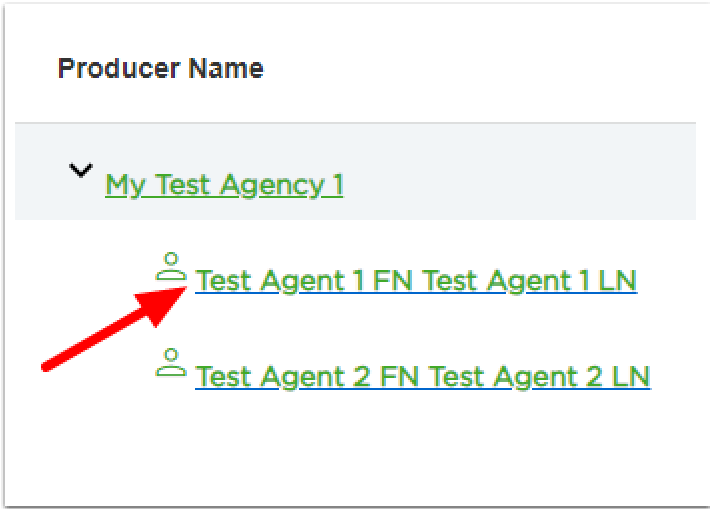
If you enter the Book of Business from an Agency Level Producer Name, the Book of Business for all of the Agents that you are authorized to view under that Agency will be displayed.



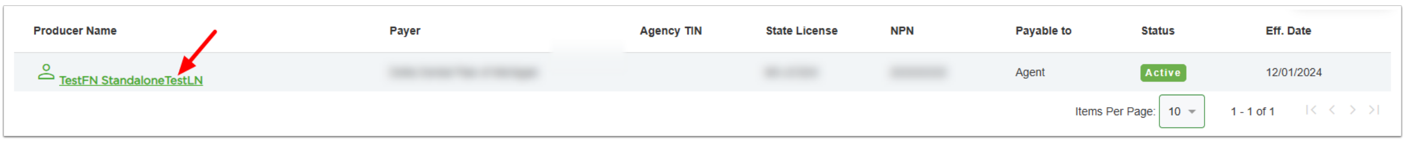


If you do not have Book of Business authorizations to view all of the Agents linked to a given Agency, you will only be able to export a partial Book of Business for that Agency. You will only have the ability to view Book of Business information for Producers you are authorized to view.

If you enter the Book of Business from an Agent Level Producer Name under an Agency, the Book of Business for only that Agent under that Agency will be displayed.



If you enter the Book of Business from a Standalone Agent Producer Name, the Book of Business for only that Standalone Agent will be displayed.



Click EXPORT ALL to download a Book of Business to your computer.

Group Book of Business and Individual Book of Business are separate files and will need to be exported separately.

Agency Name	Agency TIN	Agency License	Agency NPN	Agent Name	Agent License	Agent NPN	Payer	Group Bus State	Group ID	Subgroup ID	Group Name	Subgroup Name	Service Type	Start Date	End Date	Amount / Commission %	Comm. Rule	Frequency
My Test Agency 1	[illegible]	MI-LIC01	[illegible]	Test Agent 1 FN Test Agent 1 LN			[illegible]	MI	12005	1200	My Test Group	My Test Subgroup A	Dental	11/01/2024		4.75	Standard Percent Based on Group Size	Pay Monthly
My Test Agency 1	[illegible]	MI-LIC01	[illegible]	Test Agent 2 FN Test Agent 2 LN			[illegible]	MI	12005	1201	My Test Group	My Test Subgroup B	Dental	11/01/2024		1.2	Standard Percent Based on Group Size	Pay Monthly

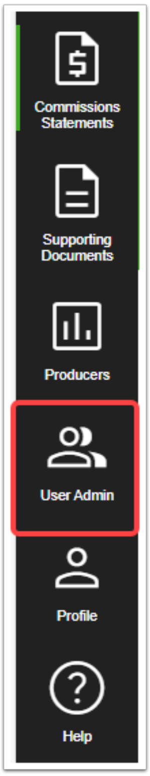
If you are having trouble downloading a Book of Business, check your settings to ensure that your popup blocker allows downloads from the Producer Toolkit site.

How to Create and Manage Users in User Admin in Producer Toolkit

You can Create and Manage Users in Producer Toolkit by following the walk-through below.

You will need Admin or Delegate authorizations to view this tab.

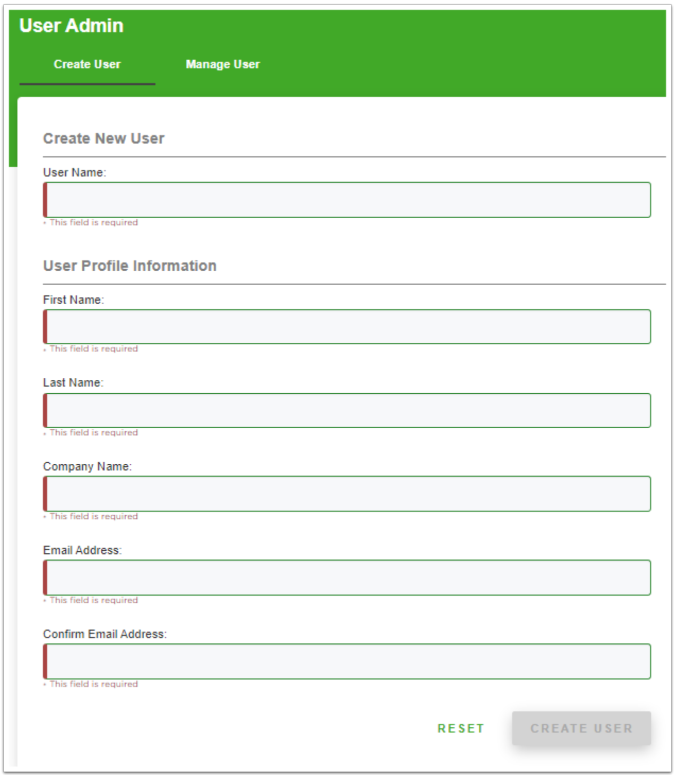
Select User Admin in the left navigation menu.



Your left navigation menu options will be based on your authorizations and may not be displayed as shown.

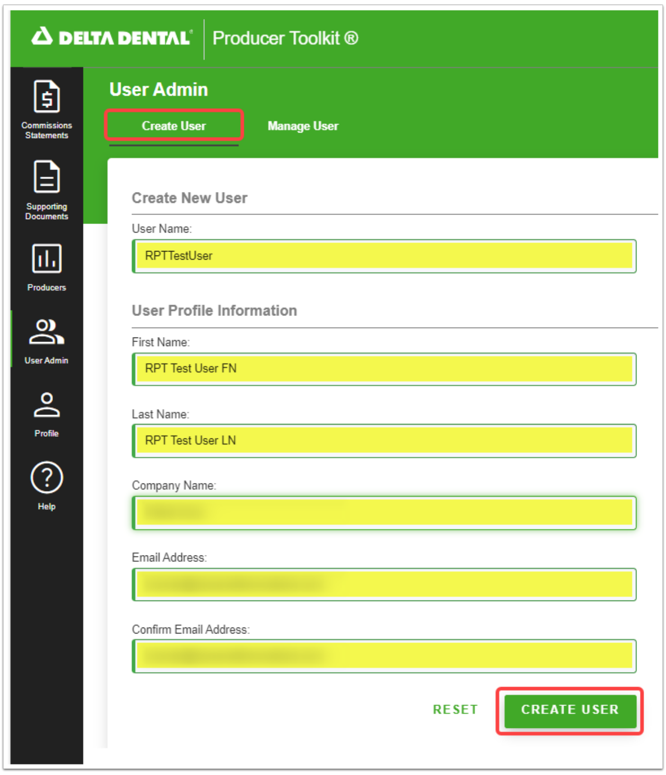
How to Create Users

In order to create a new User, you - as a Producer Toolkit Admin or Delegate - log into Producer Toolkit and navigate to the User Admin > Create User workflow.



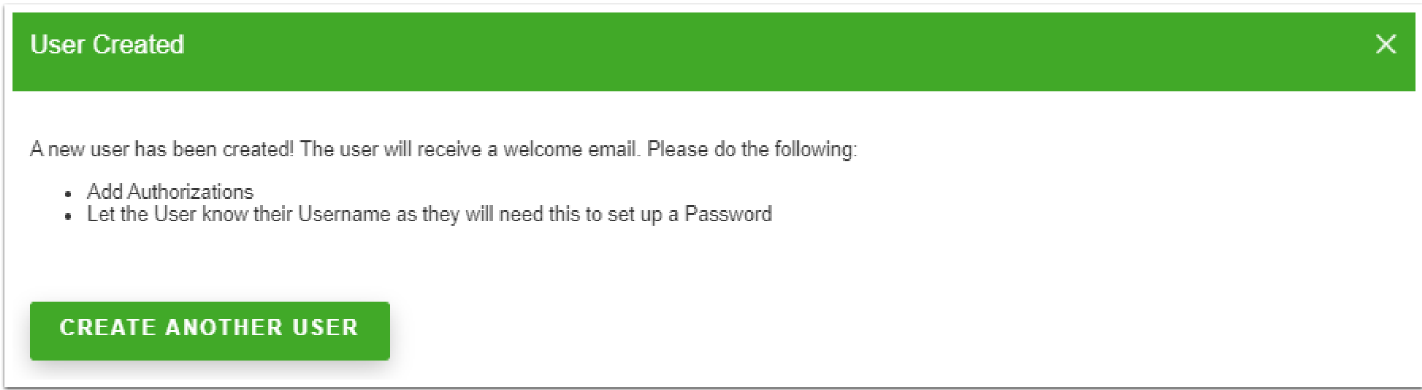
Enter the required information for your new User and Click CREATE USER.

All fields are required. The Email Address field requires the @ symbol and a period with trailing characters (.com, .gov., etc.). The CREATE USER button will be enabled once all field requirements are met.



Two things will happen when a new User is created:

1. There will be a User Created confirmation with a reminder that Authorizations will still need to be added to this new User and that the Admin or Delegate is responsible for letting the new User know their Username.
2. A welcome email is generated for the new User letting them know that an account has been created for them and that they need to obtain their Username from the Admin or Delegate who created it.



Click CREATE ANOTHER USER or Click the x in the upper right corner to close the User Created window and return to the Create User page.

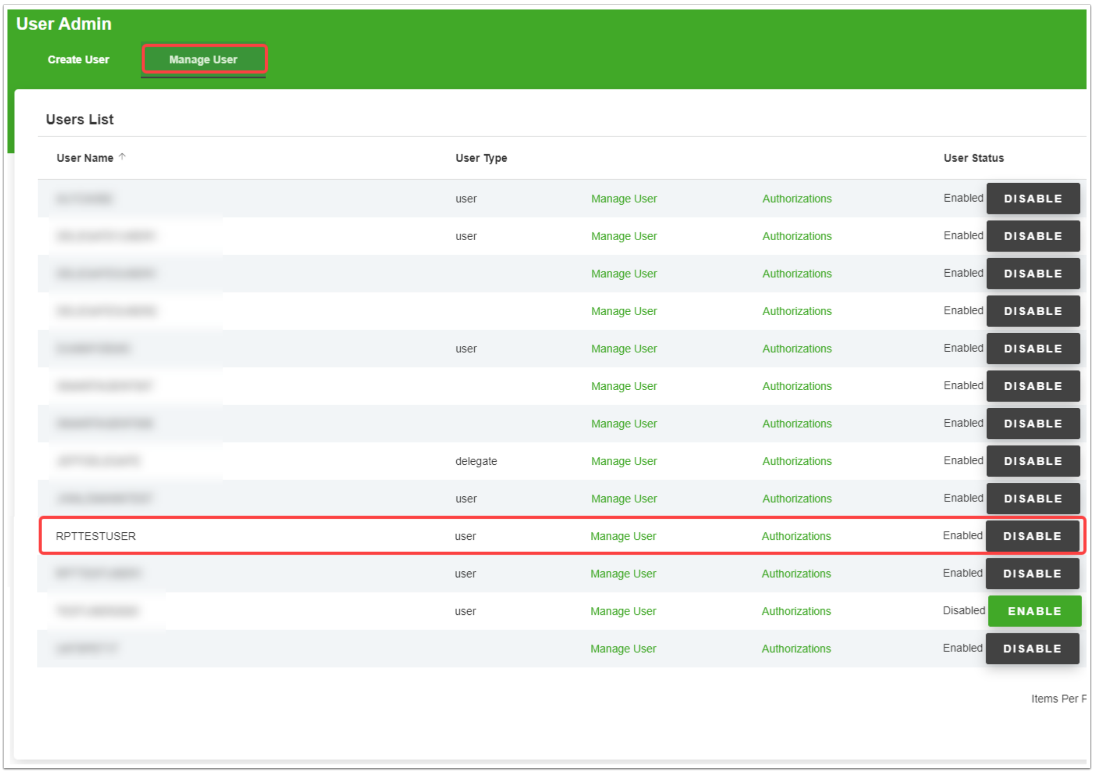
It is recommended that you proceed to [Manage User](#) to add Authorizations so the new User will have what they need to start working within the application.

View [How to Log In to Producer Toolkit (New Users)](#) for information on a new user's first time log in flow.

How to Manage Users

After creating a new User, proceed to the User Admin > Manage User tab to Manage User information, add Authorizations, or DISABLE a User.

Click Manage User and locate the record for your new User in the Users List.



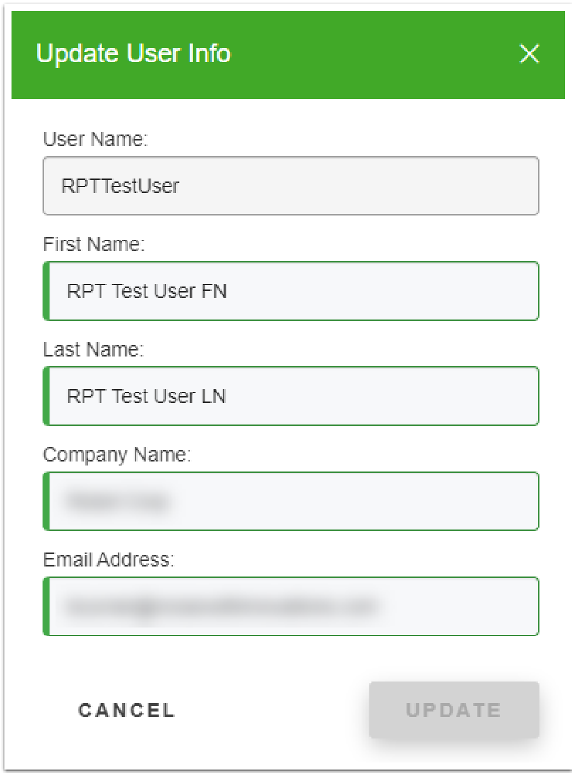
Manage User - Update User Info

1. Click Manage User.

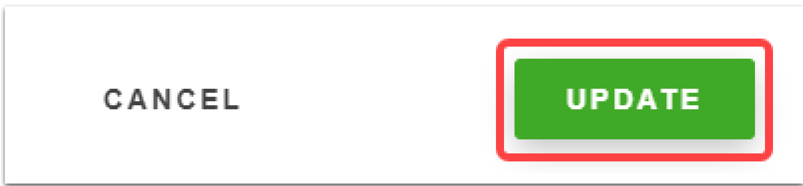
The Update User Info window for the given User will be displayed.

2. Enter your changes to Update User Info fields.

The UPDATE option will become available once a field has been changed. You are not able to update the User Name.

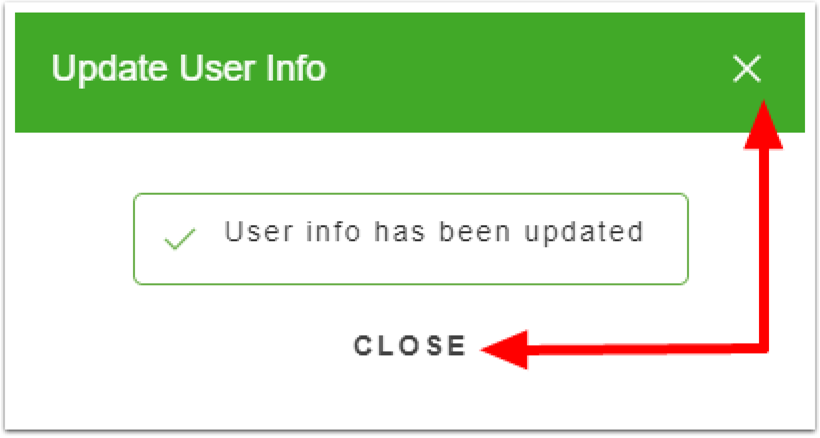


3. Click UPDATE.



You may click CANCEL to discard your updates and return to the Users List.

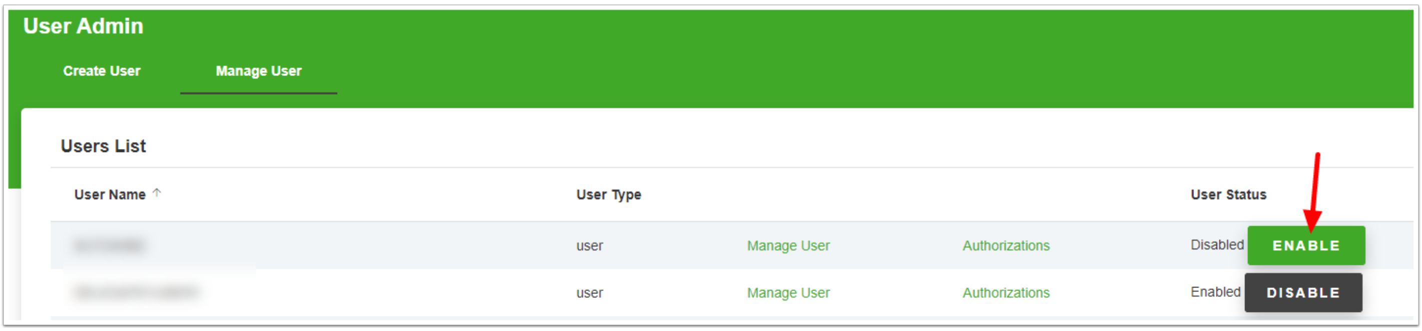
A confirmation is provided that User Info has been updated. Click CLOSE or Click the x in the upper right corner to close this window.



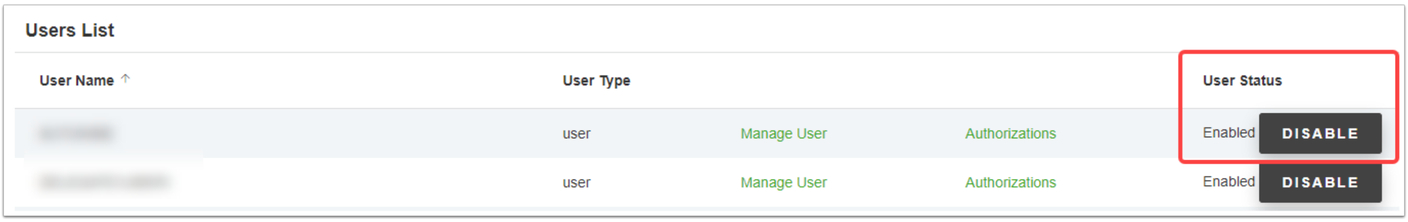
Disable / Enable Users

A User Status can be changed to or from Disabled or Enabled from the Manage User > Users List in real time.

1. Click DISABLE or ENABLE to change a User Status.



2. Confirm User Status has changed.

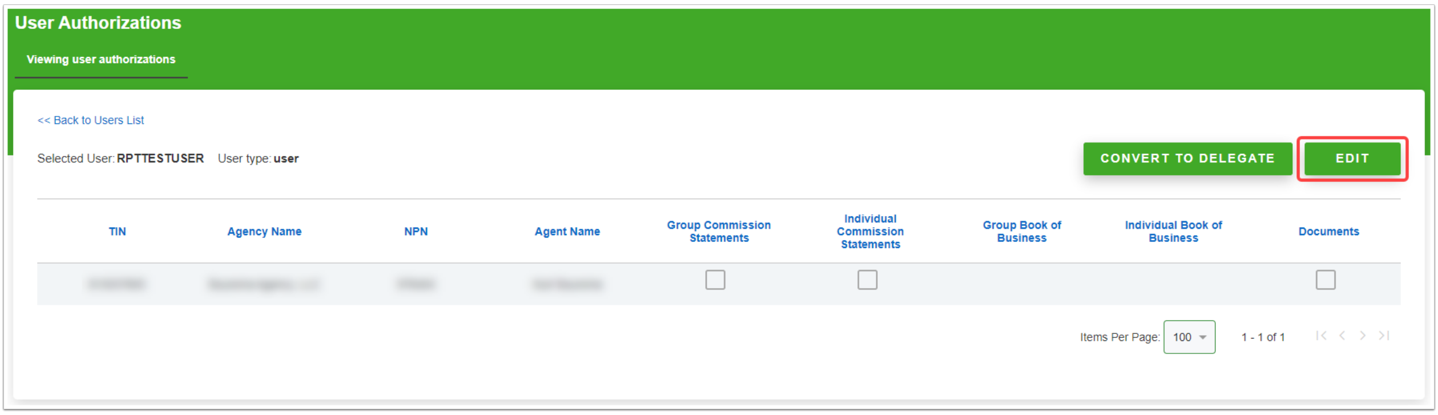


Manage Authorizations

1. Click Authorizations.

The Authorizations available to the User will be displayed on the Viewing User Authorizations page.

2. Click EDIT.

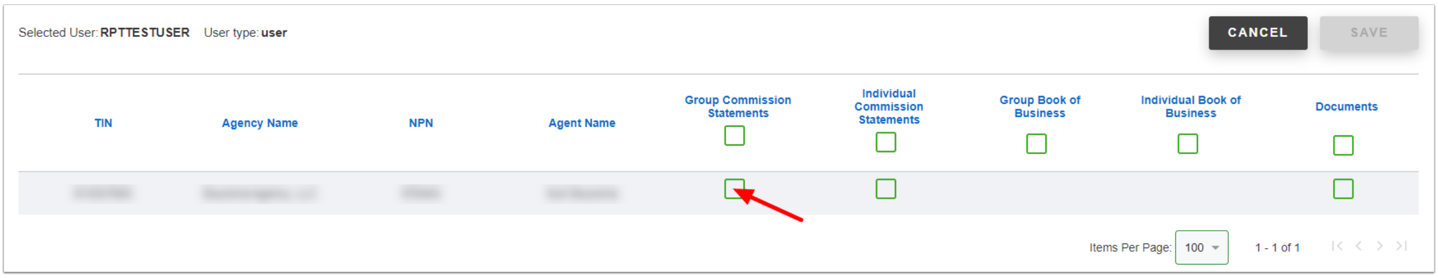


As an Admin or Delegate, you can determine if you want to assign Authorizations for a given Producer's Group Commission Statements, Individual Commission Statements, Group Book of Business, Individual Book of Business, and/or Documents.

Options displayed are based on the Admin's own access – a User or Delegate will never have the ability to have more Authorizations than their Admin.

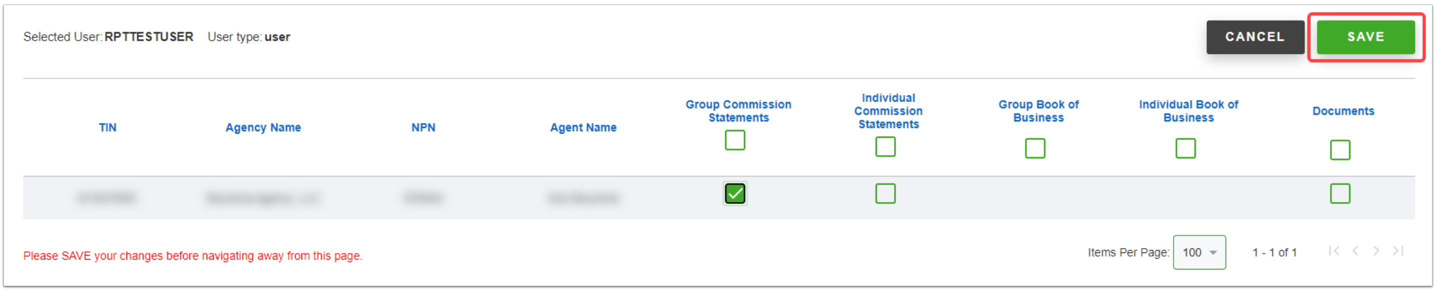
3. Click a checkbox to turn Authorizations on or off for a given Producer.

Click a checkbox in the header row to turn Authorizations on or off for the entire column of Producers displayed on the page.



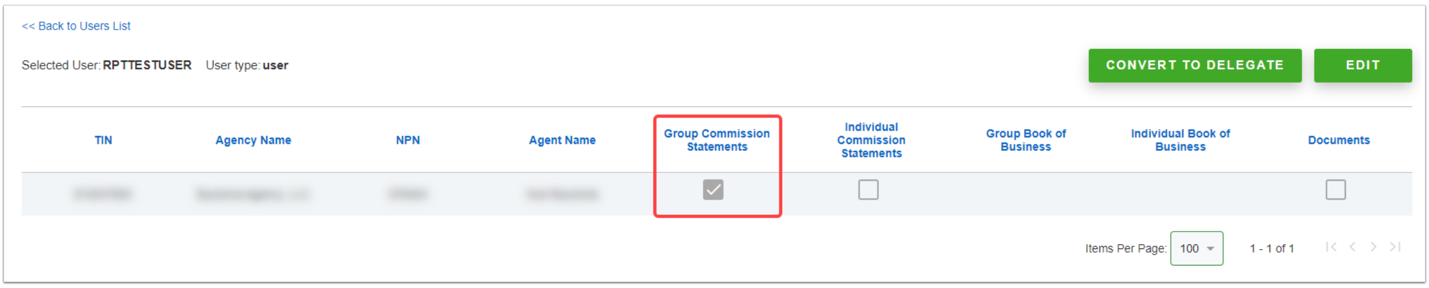
SAVE becomes enabled once a configuration has been changed.

4. Click SAVE to commit your changes.



> You may click CANCEL to discard your updates and return to the Viewing User Authorizations page.

You will then be returned to the Viewing User Authorizations page to view the Authorizations you assigned to the new User.



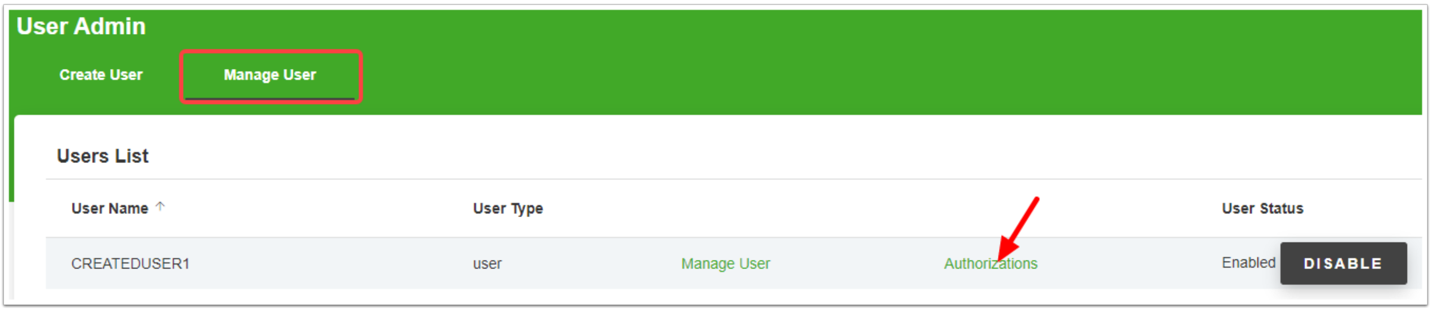
Convert a User to Delegate or Convert a Delegate to User - For Producer Toolkit Admins ONLY

A Producer Toolkit Admin can convert a normal User to a Delegate or convert a Delegate to a normal User. A Delegate's authorizations automatically mirror the Producer Toolkit Admin's own authorizations. Delegates are able to create and manage Users on the Admin's behalf within the limits of those authorizations.

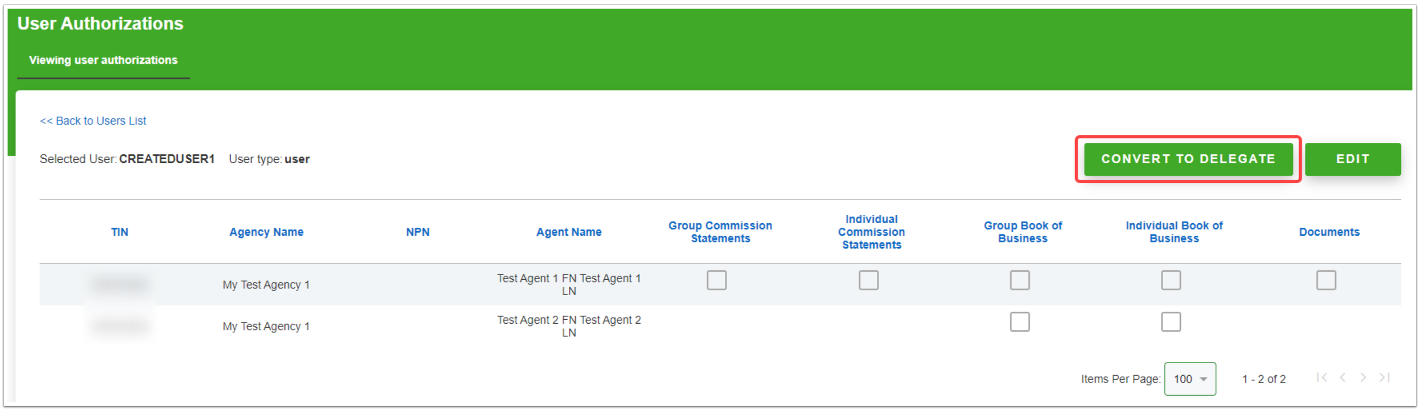
Convert a User to Delegate or Convert a Delegate to User - For Producer Toolkit Admins ONLY

A Producer Toolkit Admin can convert a normal User to a Delegate or convert a Delegate to a normal User. A Delegate's authorizations automatically mirror the Producer Toolkit Admin's own authorizations. Delegates are able to create and manage Users on the Admin's behalf within the limits of those authorizations.

Navigate to User Authorizations from the User Admin > Manage User > Users List for the person you would like to Convert.

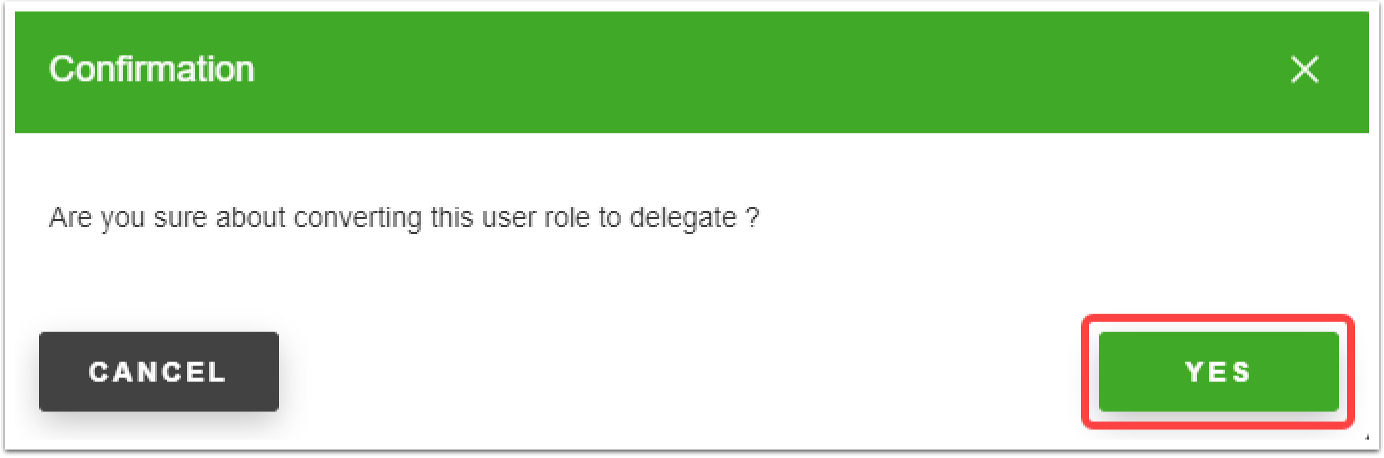


Click CONVERT TO DELEGATE.

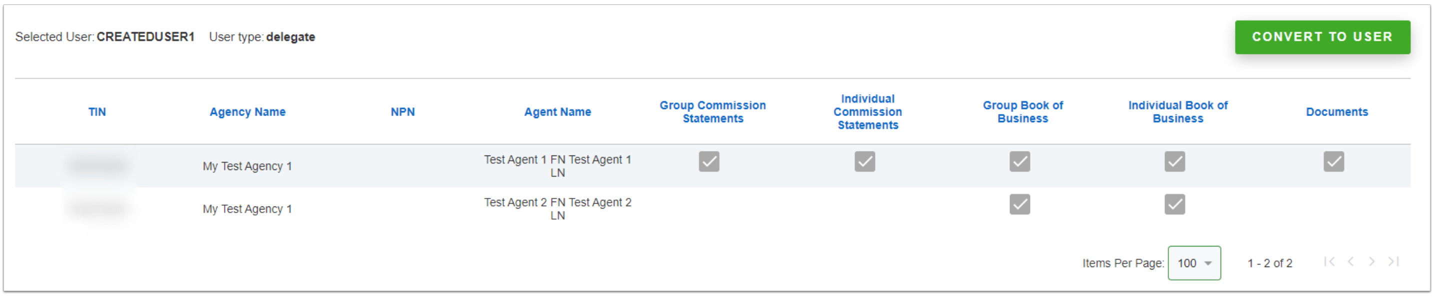


Click YES.

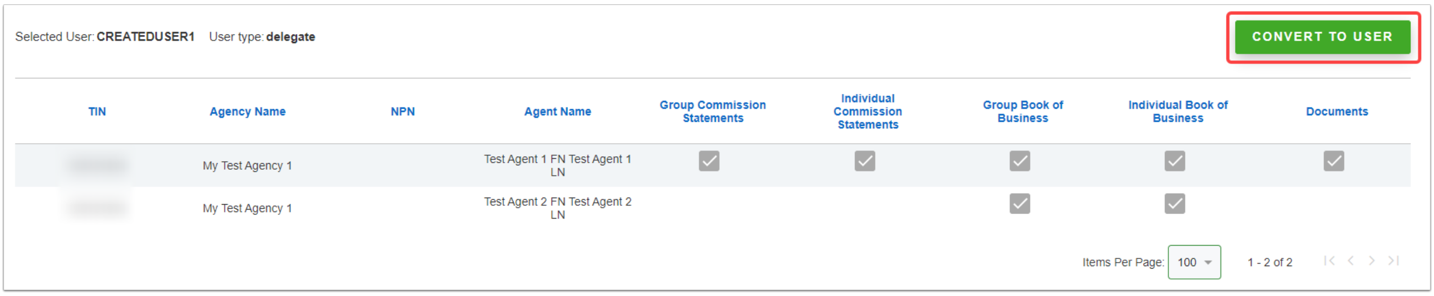
You may click CANCEL to return to Viewing User Authorizations without committing the conversion.



The User is now a Delegate with the same authorizations as the Producer Toolkit Admin.

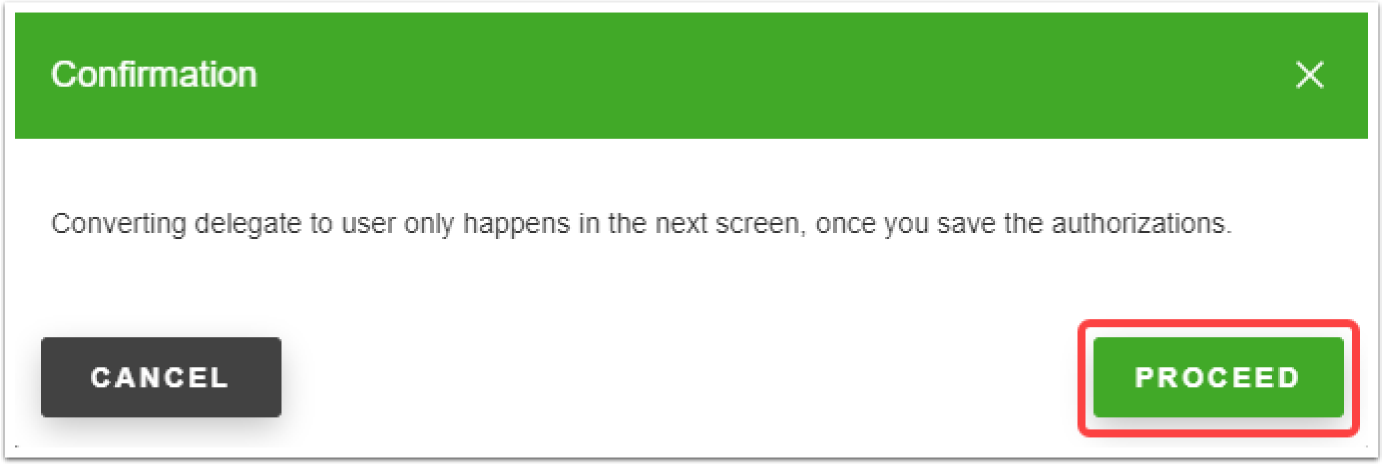


Click CONVERT TO USER.



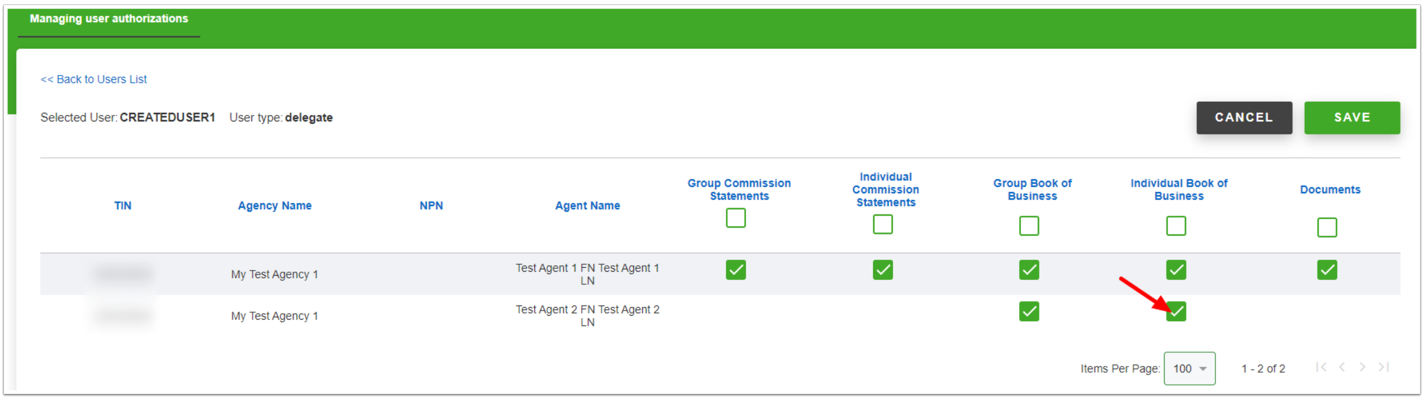
Click PROCEED.

- You may click CANCEL to return to Viewing User Authorizations without committing the conversion.



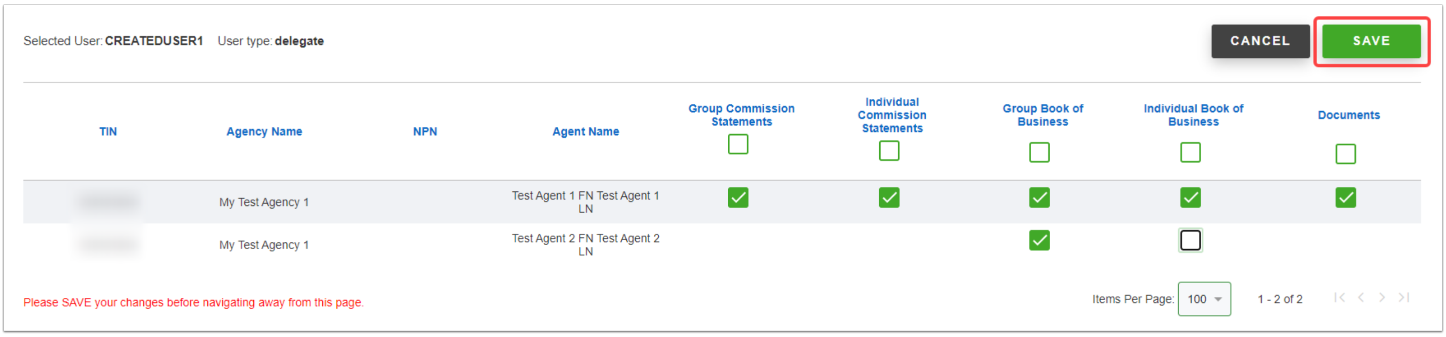
The Delegate will NOT be converted to a normal User until you click SAVE.

Select Authorization configuration changes if desired.

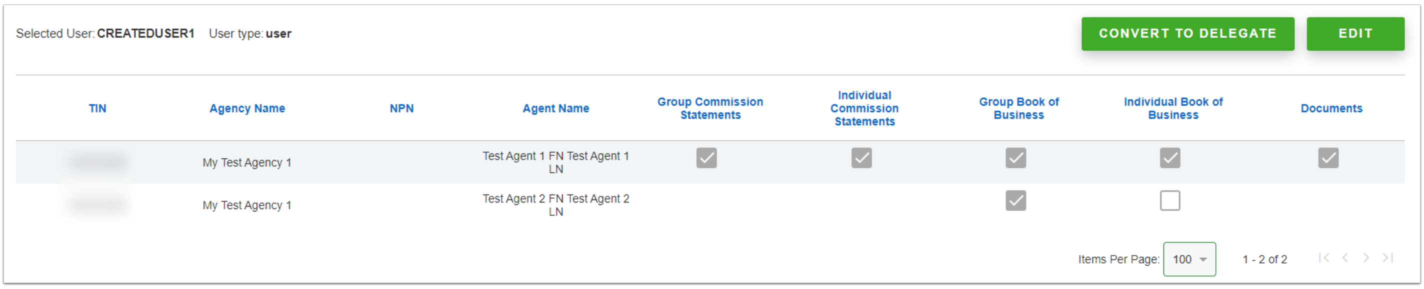


Click SAVE.

You may click CANCEL to return to Viewing User Authorizations without committing the conversion.



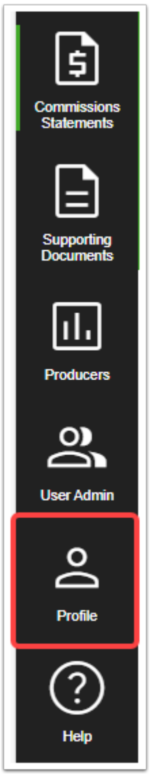
Your Delegate has been converted to a normal User and will no longer have access to create or manage other Users.



How to View and Update your Profile Information in Producer Toolkit

You can view your Authorizations, update Password Management and set up Login Authentication in the Producer Toolkit Profile tab by following the walk-through below.

Select Profile in the left navigation menu.



Your left navigation menu options will be based on your authorizations and may not be displayed as shown.

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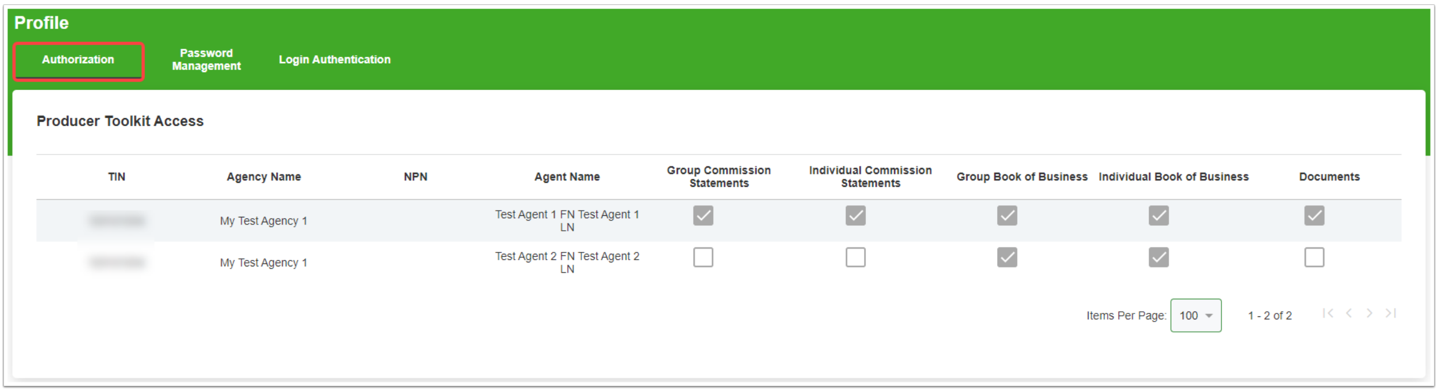
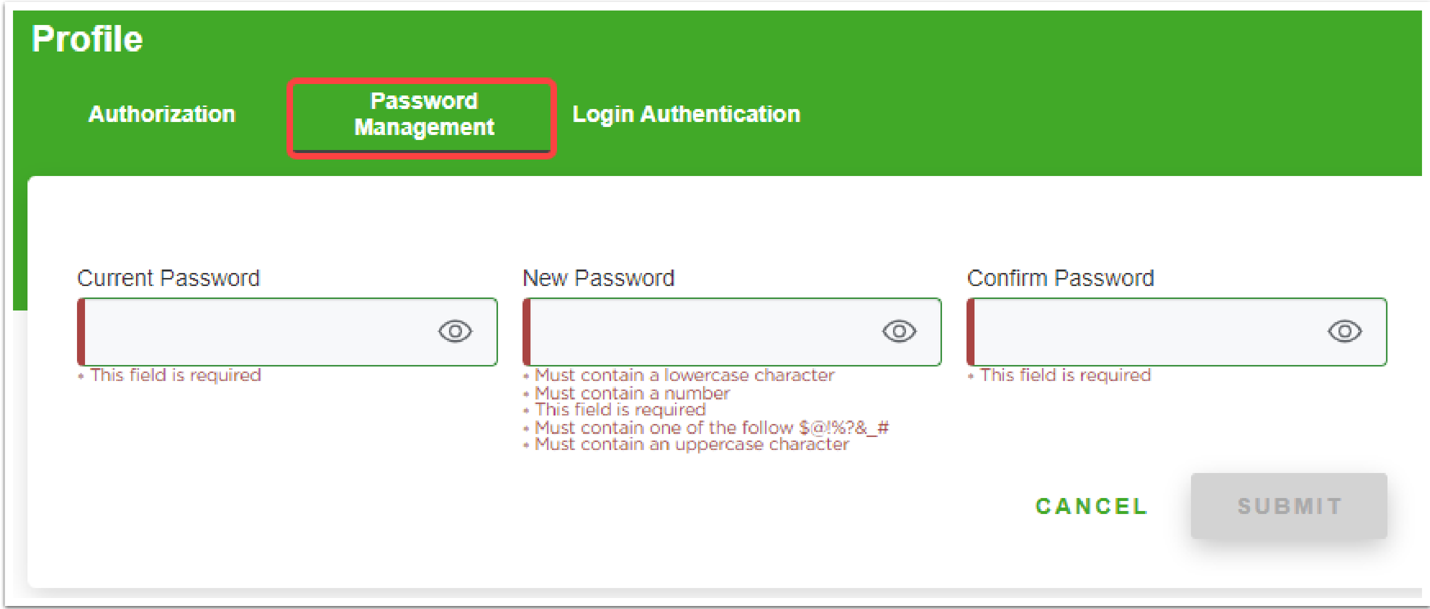
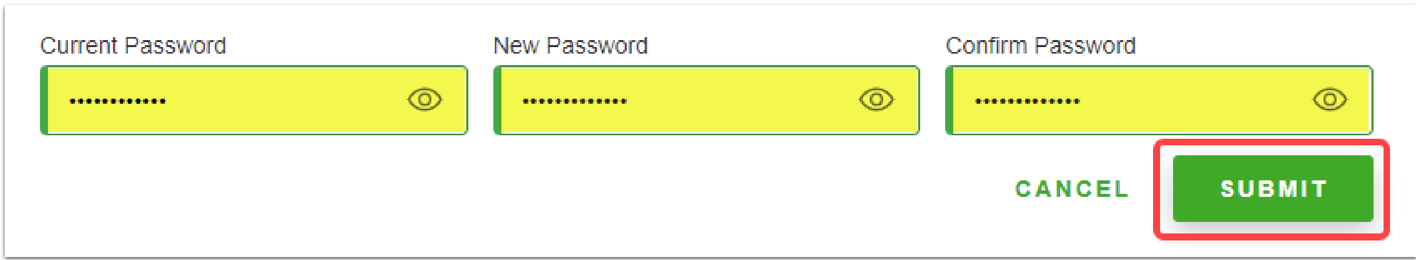
View your own Producer Toolkit Authorizations in the Authorization tab.



Change your Producer Toolkit Password in the Password Management tab.

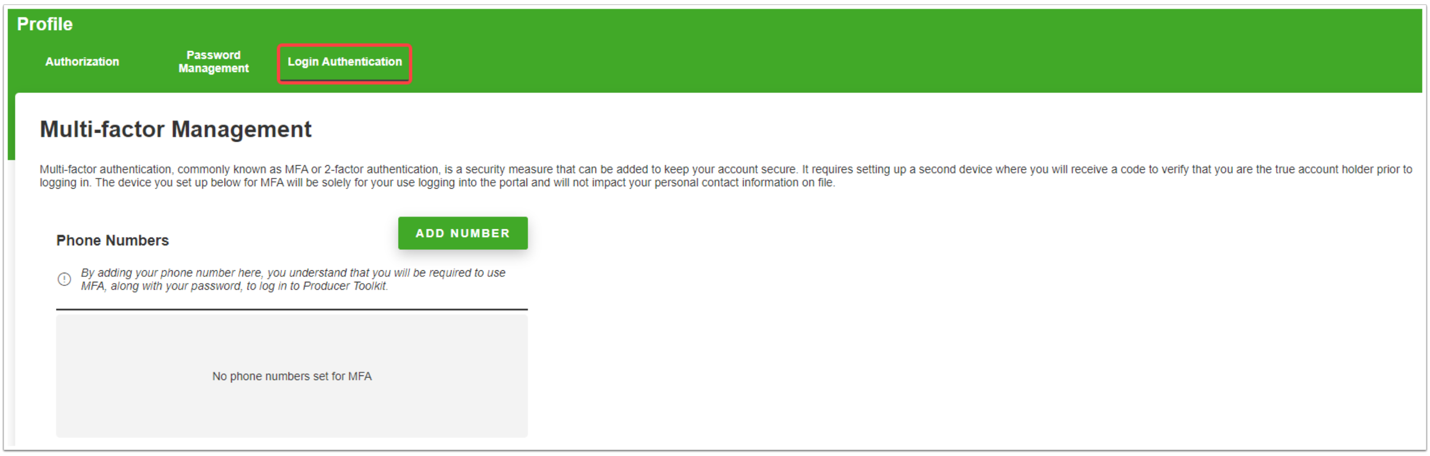


Complete the required fields and Click SUBMIT to update your password.

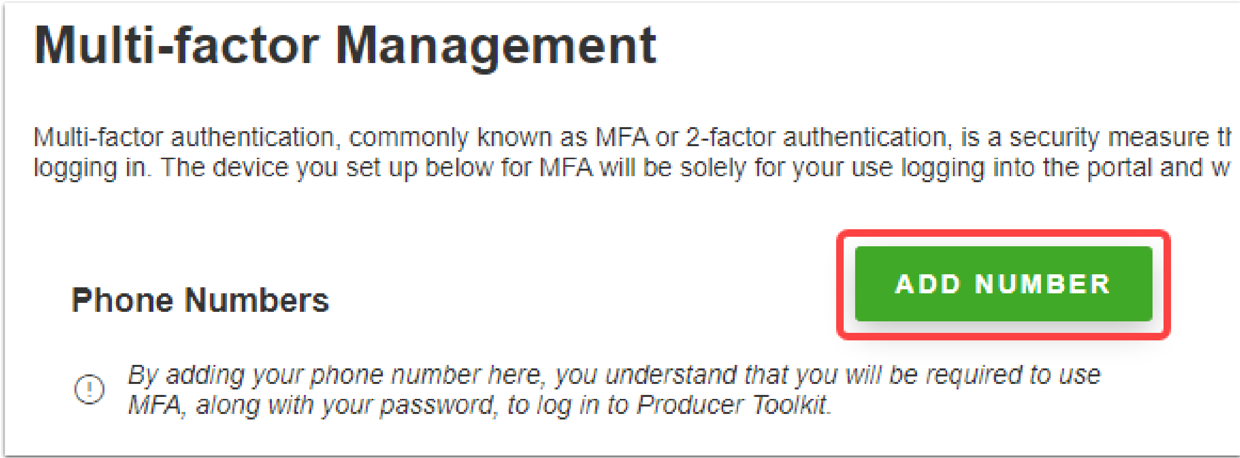


You may click CANCEL to return to Password Management without committing the update.

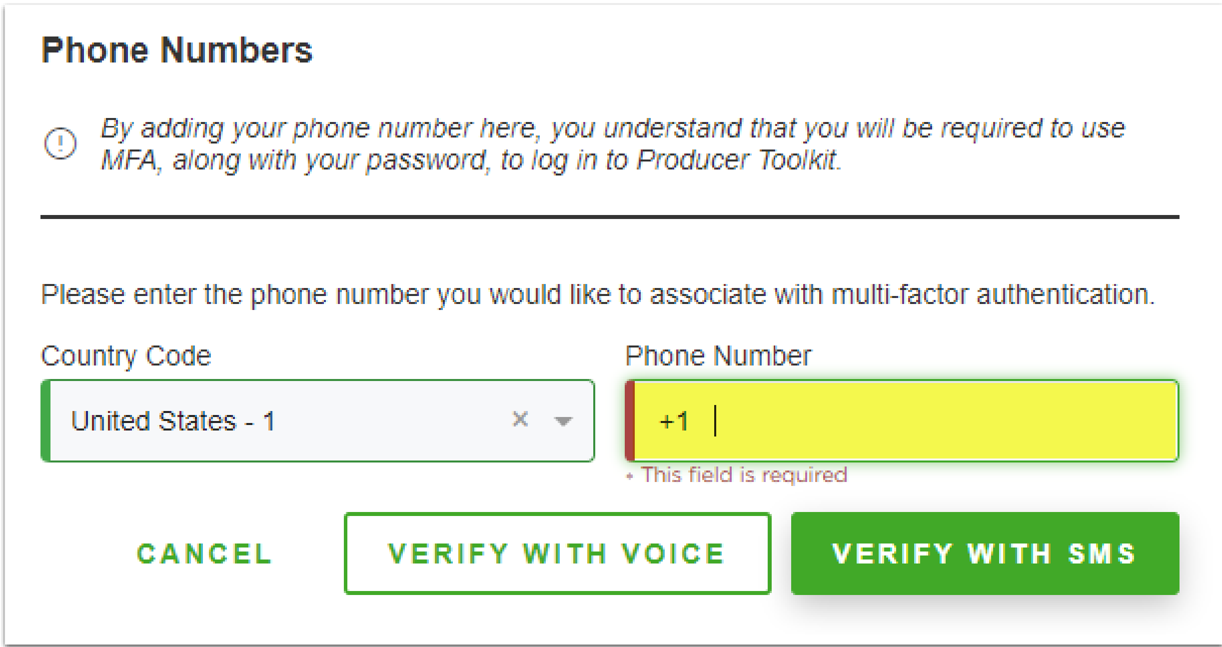
Set up Producer Toolkit Multi-Factor Authentication in the Login Authentication tab.



1. Click ADD NUMBER



2. Enter your Phone Number.

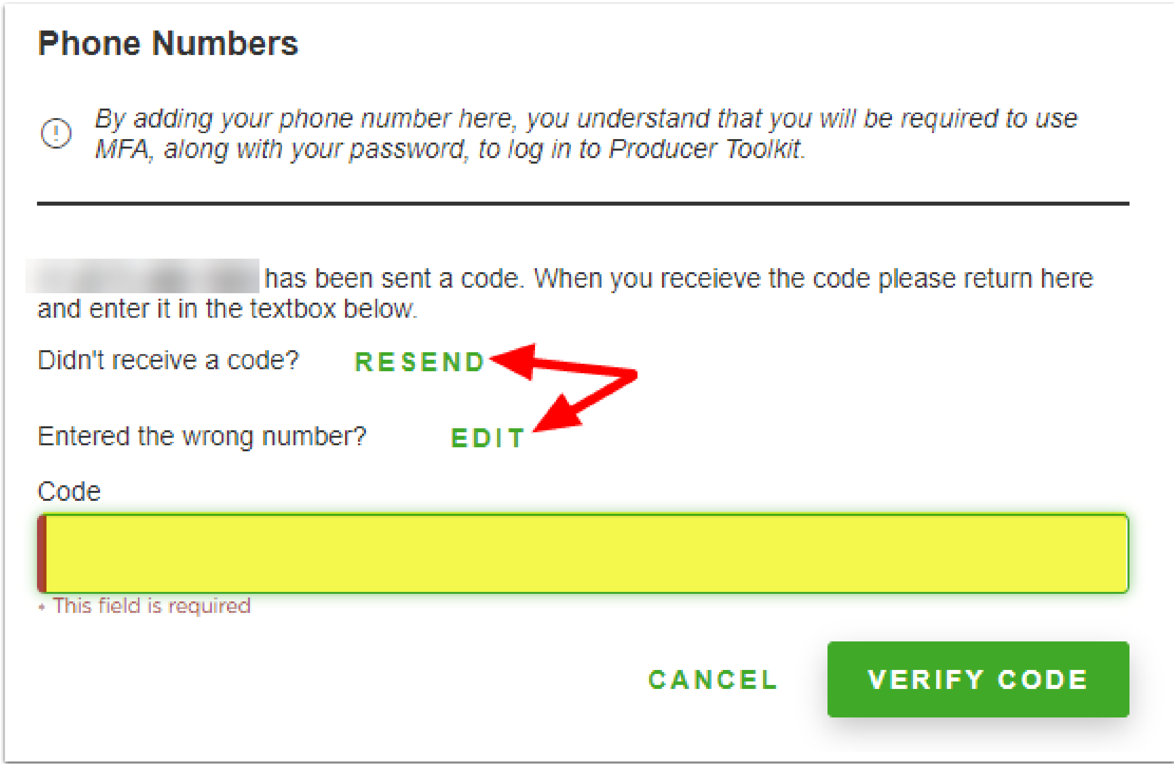


3. Click VERIFY WITH VOICE (phone call) or VERIFY WITH SMS (text message) to receive a verification code at the given Phone Number.

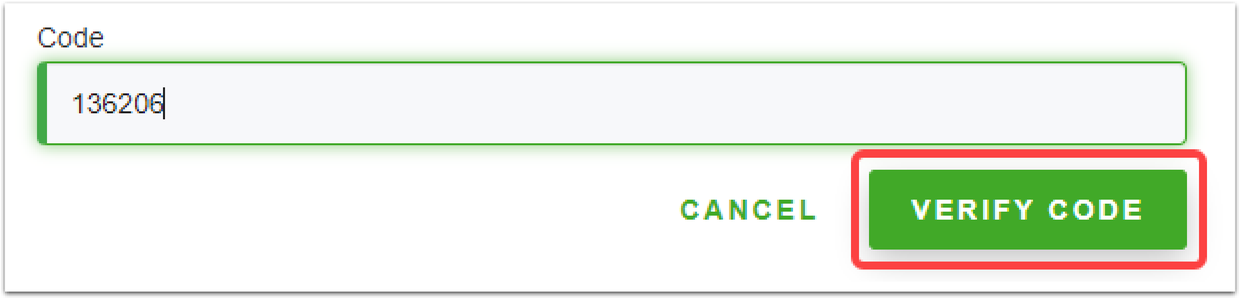
You may click CANCEL at any time to return to Login Authentication without committing the update.

4. Enter your Code.

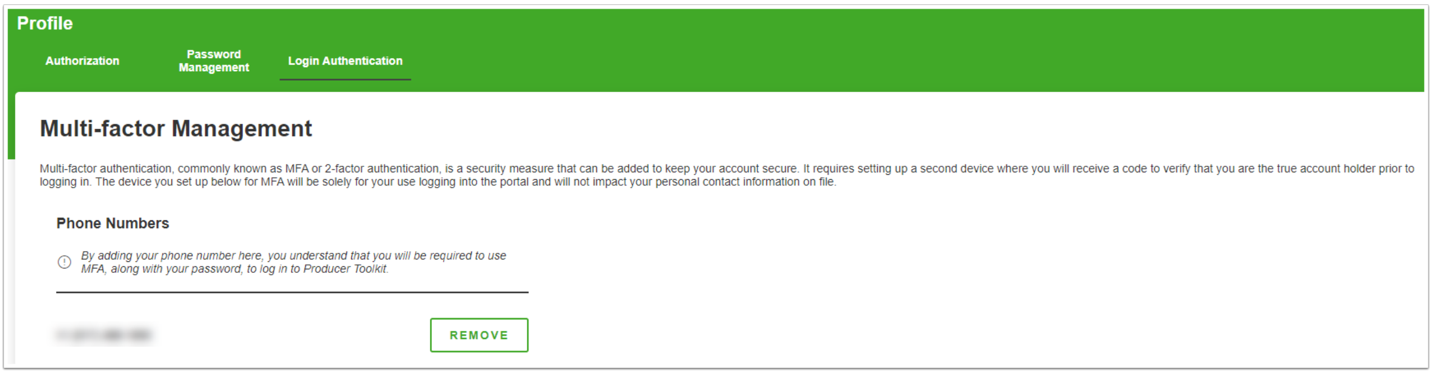
You may click EDIT if you have entered the wrong number or you may click RESEND to try again if you did not receive a code.



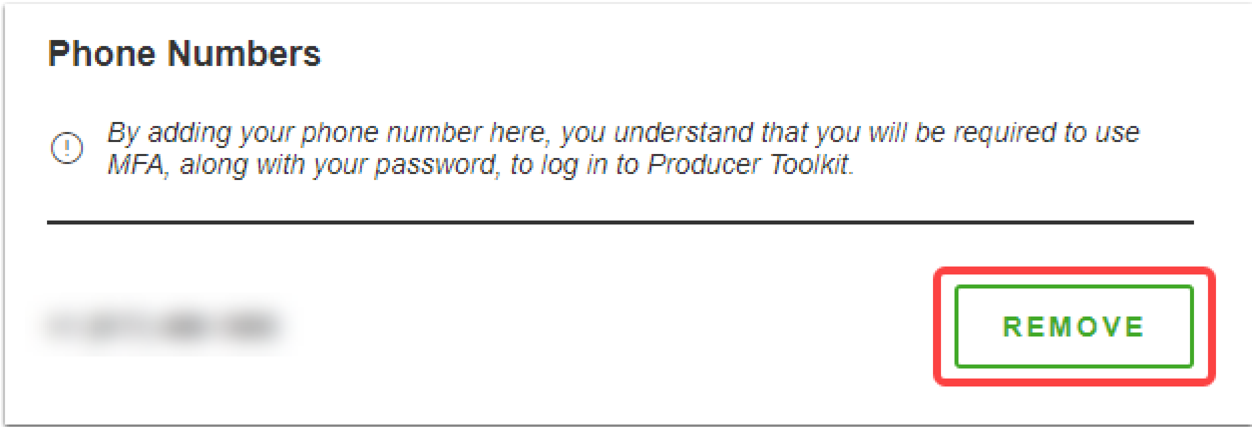
5. Click VERIFY CODE.



Your Phone Number is added as a 2-factor authentication and will be required, along with your password, to log in to Producer Toolkit in the future.



You may click REMOVE to remove the Login Authentication requirement.



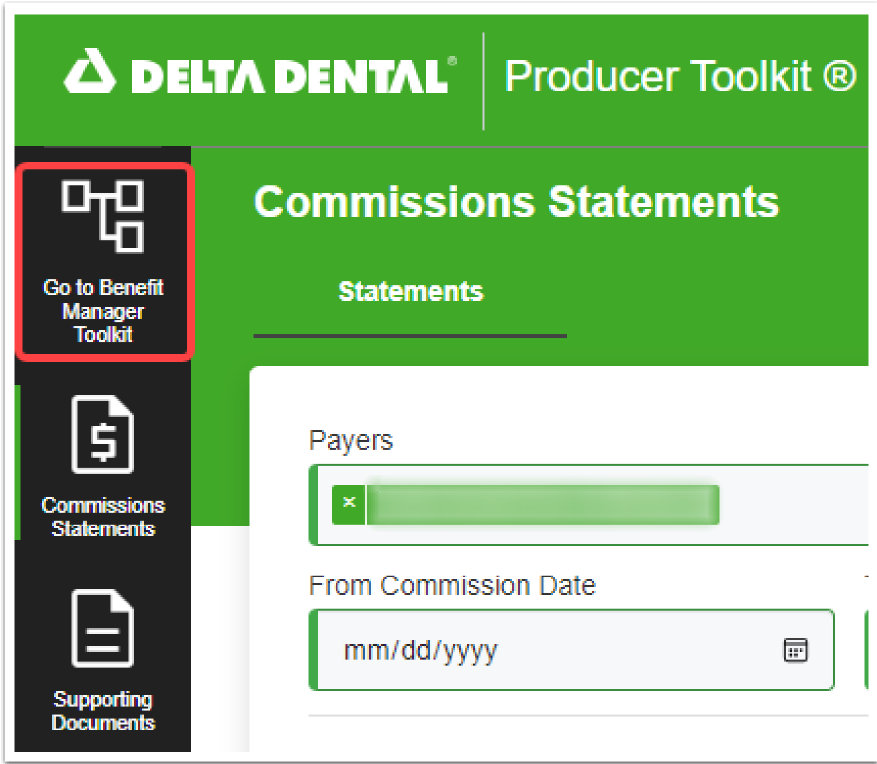
How to Switch from Producer Toolkit to Benefit Manager Toolkit

When a single user login ID has authorizations in both BMT and Producer Toolkit, they are able to open a new browser tab to Benefit Manager Toolkit from within Producer Toolkit by following the walk-through below.

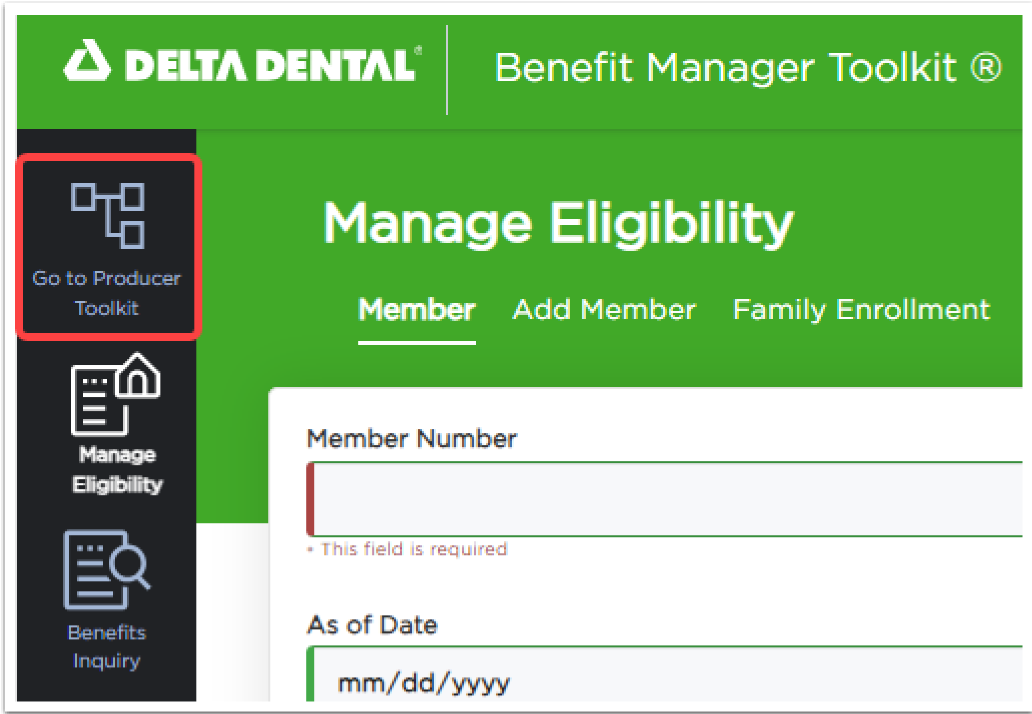
1. Log in to Producer Toolkit.

2. Select Go to Benefit Manager Toolkit in the left navigation menu.

Your left navigation menu options will be based on your authorizations and may not be displayed as shown.



Your Producer Toolkit tab will remain open and a new browser tab will open to your Benefit Manager Toolkit account.



Alternatively, if you are already logged in to BMT, you may click Go to Producer Toolkit from within BMT to open Producer Toolkit in a new browser window tab.