

PRODUCER TOOLKIT MANUAL



Table of Contents

How to Log In to Producer Toolkit (New Admins)	3
How to Log In to Producer Toolkit (New Users).....	9
How to Search for and Download Commissions Statements in Producer Toolkit.....	15
How to Search for and Download Supporting Documents in Producer Toolkit.....	19
How to Search for Producers and Export Book of Business in Producer Toolkit.....	24
How to Create and Manage Users in User Admin in Producer Toolkit.....	31
How to View and Update your Profile Information in Producer Toolkit.....	43
How to Switch from Producer Toolkit to Benefit Manager Toolkit	49

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.



Register Account (Step 1 of 2)

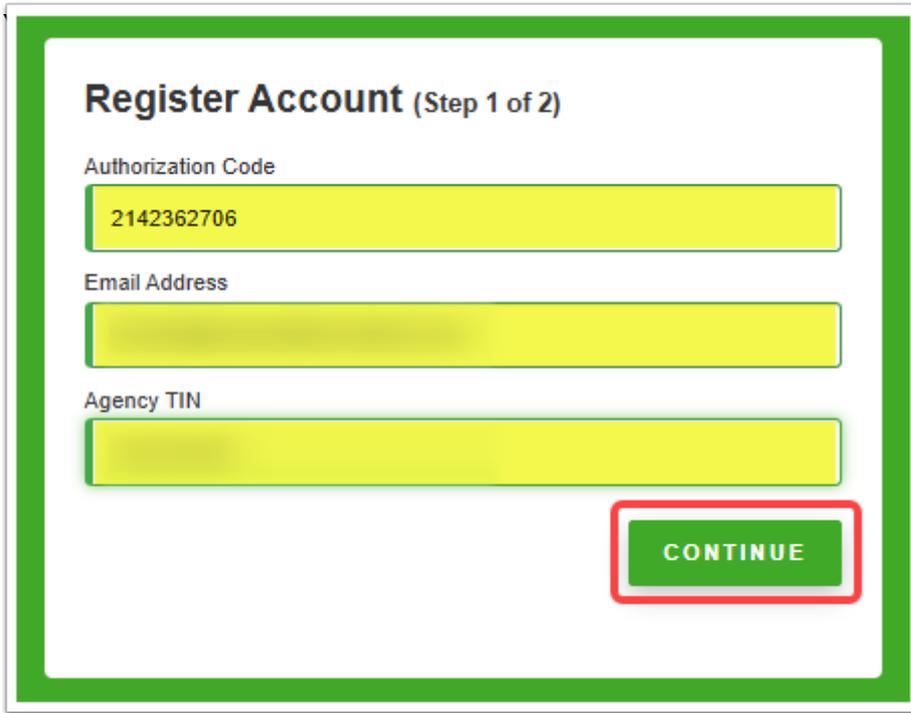
Authorization Code
* This field is required

Email Address
* This field is required

Agency TIN
* This field is required

CONTINUE

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



Register Account (Step 1 of 2)

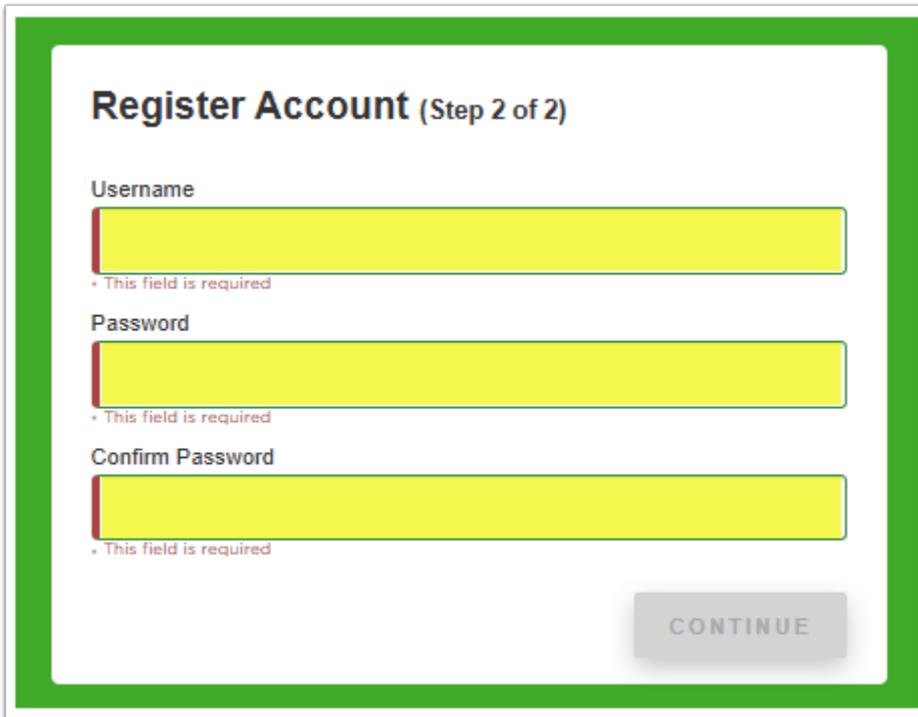
Authorization Code
2142362706

Email Address

Agency TIN

CONTINUE

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



Register Account (Step 2 of 2)

Username

* This field is required

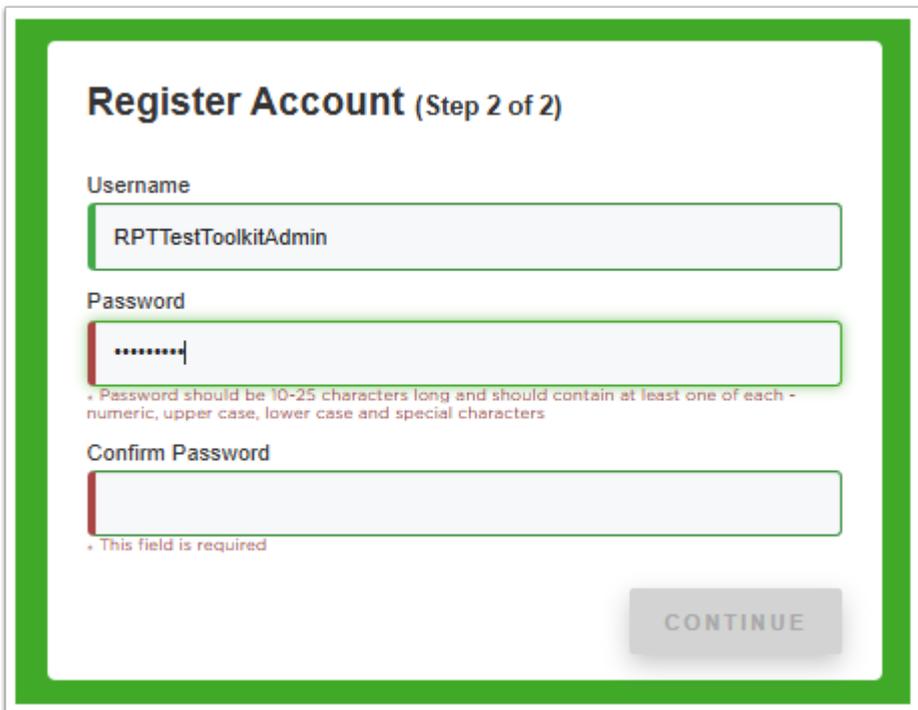
Password

* This field is required

Confirm Password

* This field is required

CONTINUE



Register Account (Step 2 of 2)

Username

Password

* Password should be 10-25 characters long and should contain at least one of each - numeric, upper case, lower case and special characters

Confirm Password

* This field is required

CONTINUE

Register Account (Step 2 of 2)

Username

RPTTestToolkitAdmin

Password

Confirm Password

* Passwords do not match

CONTINUE

Register Account (Step 2 of 2)

Username

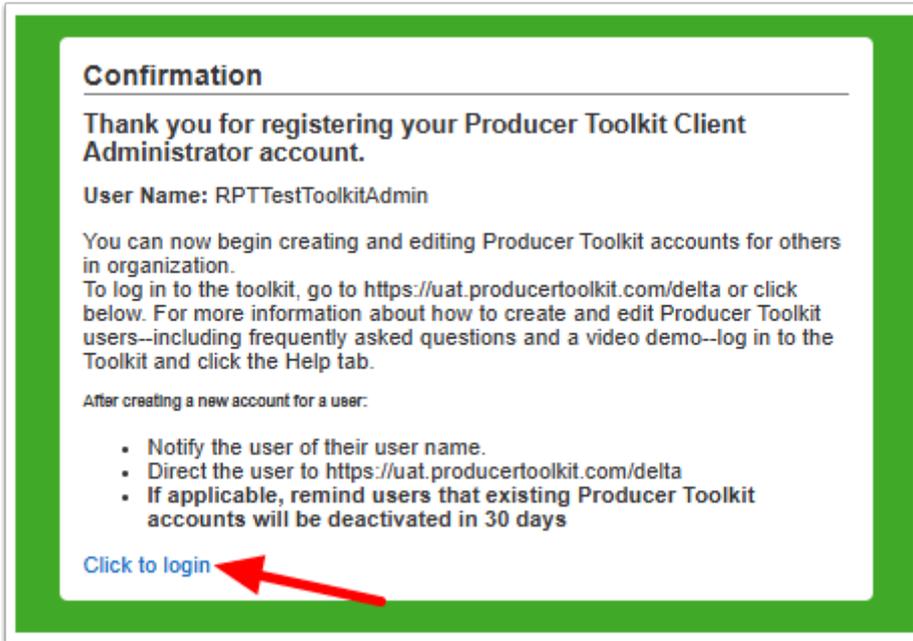
RPTTestToolkitAdmin

Password

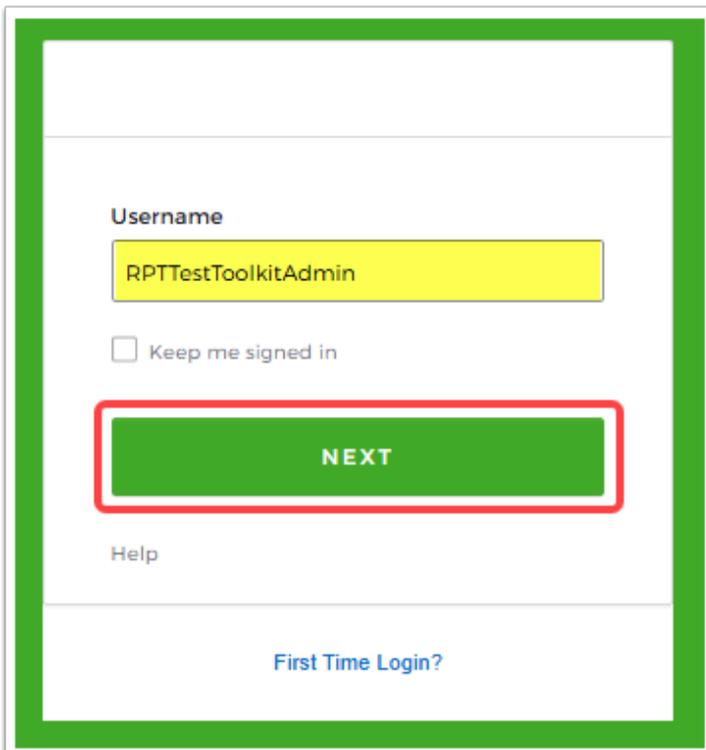
Confirm Password

CONTINUE

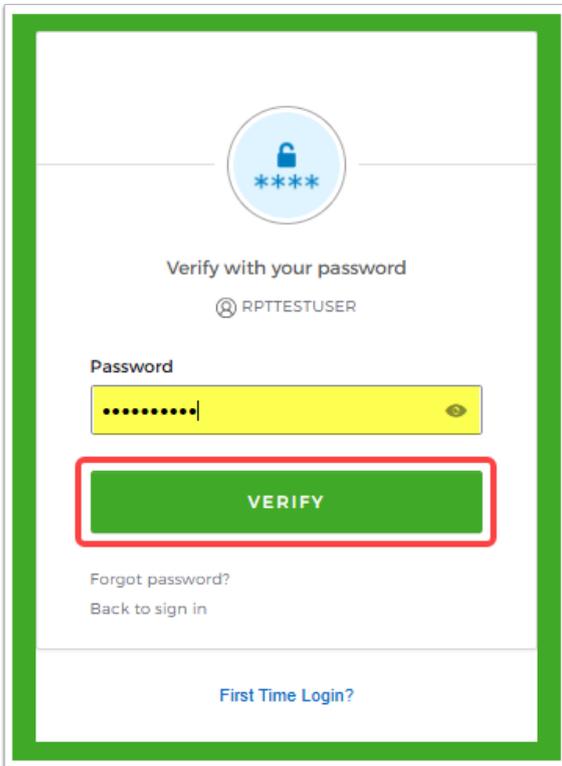
4. Review your Confirmation, then select Click to login.



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**.



Verify with your password

RPTTESTUSER

Password

VERIFY

[Forgot password?](#)

[Back to sign in](#)

[First Time Login?](#)

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.



First Time Login ✕

On the login page, please enter your username and click on next and proceed to the Forgot Password workflow. This will allow you to create a unique password, so that you can get started using the Producer Toolkit.

Here they will start a workflow to create a password.

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



The screenshot shows the login interface for the Delta Dental Producer Toolkit. On the left, the Delta Dental logo is displayed above the text "Log in to Producer Toolkit ®". On the right, a white login form is overlaid on the green background. The form includes a "Username" label, a text input field containing "RPTTestUser", a "Keep me signed in" checkbox, a green "NEXT" button, and a "Help" link. At the bottom right of the form, there is a "First Time Login?" link.

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.

Hi RPT Test User FN,

A password reset request was made for your Okta account. If you did not make this request, please contact your system administrator immediately.

Click this link to reset the password for your username, RPTTestUser:

[Reset Password](#)

This link expires in 5 minutes.

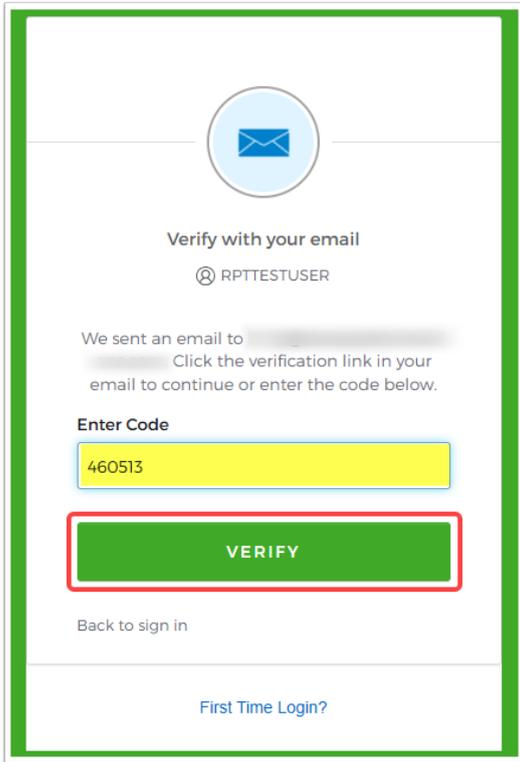
Can't use the link? Enter a code instead: **460513**

4. Click Enter a verification code instead.

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

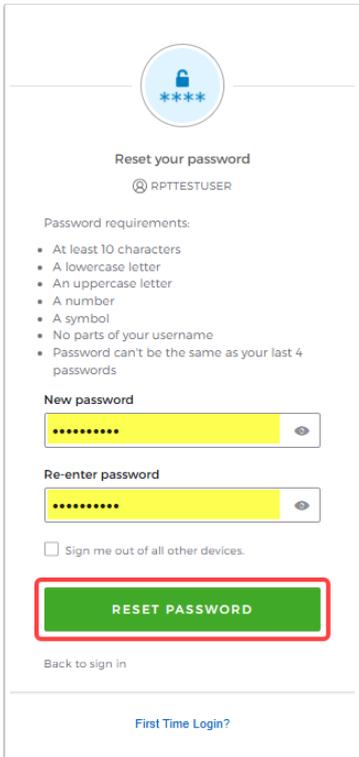


5. Enter Code and click VERIFY.



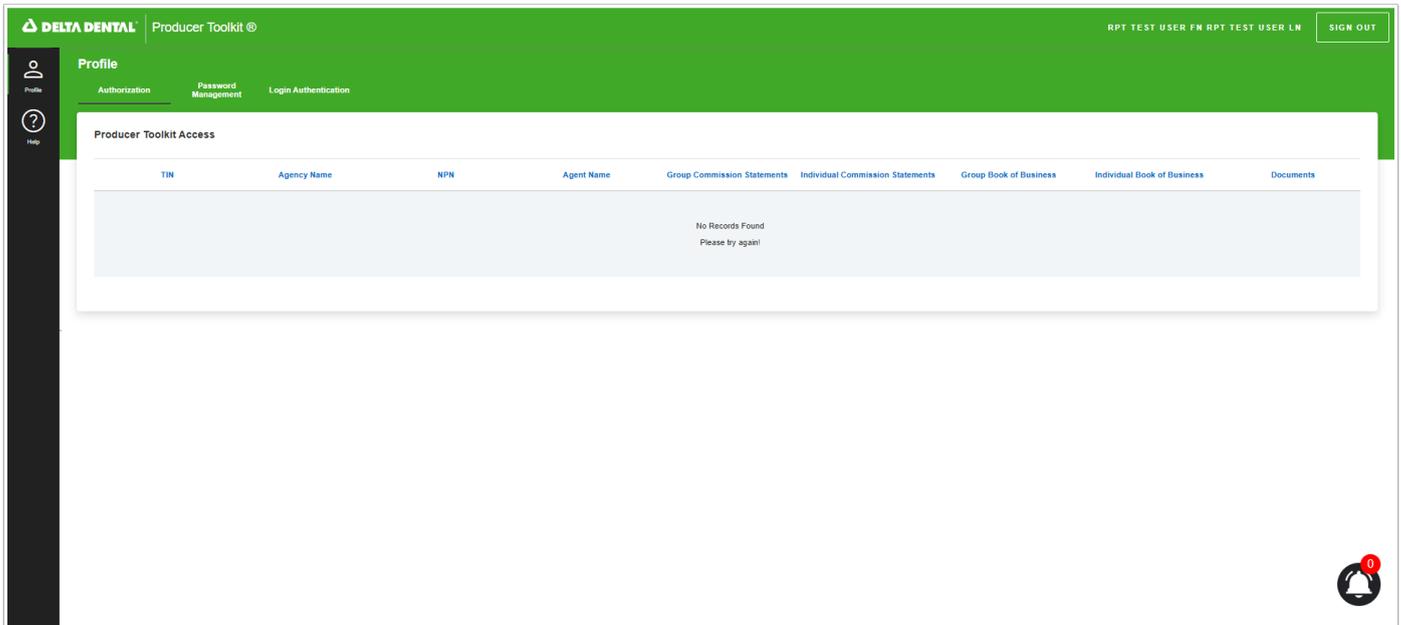
The image shows a mobile application screen for email verification. At the top, there is a blue envelope icon inside a light blue circle. Below this, the text reads "Verify with your email" followed by the username "@ RPTTESTUSER". A message states: "We sent an email to [redacted] Click the verification link in your email to continue or enter the code below." There is a yellow input field containing the code "460513". Below the input field is a green button with the text "VERIFY" in white, which is highlighted with a red rectangular border. At the bottom left, there is a link "Back to sign in". At the bottom center, there is a link "First Time Login?".

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



The screenshot shows a password reset form. At the top, there is a lock icon with four asterisks. Below it, the text reads "Reset your password" followed by the username "RPTTESTUSER". A section titled "Password requirements:" lists several criteria: at least 10 characters, a lowercase letter, an uppercase letter, a number, a symbol, no parts of the username, and not being the same as the last 4 passwords. There are two input fields: "New password" and "Re-enter password", both containing asterisks. A checkbox labeled "Sign me out of all other devices." is present. A green button labeled "RESET PASSWORD" is highlighted with a red border. At the bottom, there are links for "Back to sign in" and "First Time Login?".

The new user is logged in.



The screenshot shows the Delta Dental Producer Toolkit dashboard. The top navigation bar is green and contains the Delta Dental logo, "Producer Toolkit", and user information "RPT TEST USER FN RPT TEST USER LN" with a "SIGN OUT" button. A left sidebar contains "Profile" and "Help" icons. The main content area is titled "Profile" and includes sub-sections for "Authorization", "Password Management", and "Login Authentication". Below this is a "Producer Toolkit Access" section with a table. The table has columns for "TIN", "Agency Name", "NPN", "Agent Name", "Group Commission Statements", "Individual Commission Statements", "Group Book of Business", "Individual Book of Business", and "Documents". The table is currently empty, displaying the message "No Records Found Please try again!". A notification bell icon with a red "1" is in the bottom right corner.

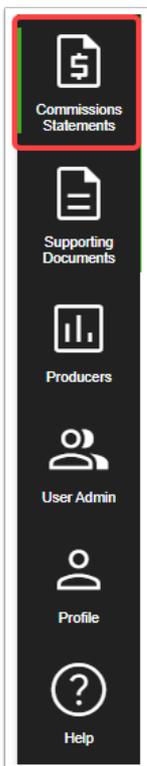
TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
No Records Found Please try again!								

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.

Commissions Statements

Statements

Payers: [x] Agency TINs: [x] Agent Names: [] NPNs: [] From Commission Date: mm/dd/yyyy To Commission Date: mm/dd/yyyy Commission Type: Individual, Group

RESET SEARCH

Payers	Producer Name	Statement Name	Commission Type	Commission Period	Payment Date	Paid Amount	Statement
		_Feb2024Comm	Group	02/01/2024 - 02/29/2024	03/13/2024	\$3905.87	[Print] [Grid]
		_Jan2024Comm	Group	01/01/2024 - 01/31/2024	02/07/2024	\$3434.56	[Print] [Grid]
		_Dec2023Comm	Group	12/01/2023 - 12/31/2023	01/10/2024	\$3954.99	[Print] [Grid]

Items Per Page: 10 1 - 3 of 3

□ 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.

Payers: [] Agency TINs: [] Agent Names: [] NPNs: [] From Commission Date: mm/dd/yyyy To Commission Date: mm/dd/yyyy Commission Type: []

RESET SEARCH

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.

To Commission Date: 11/19/2024

Commission Type: Group, Individual

November 2024

Su Mo Tu We Th Fr Sa

27 28 29 30 31 1 2

3 4 5 6 7 8 9

10 11 12 13 14 15 16

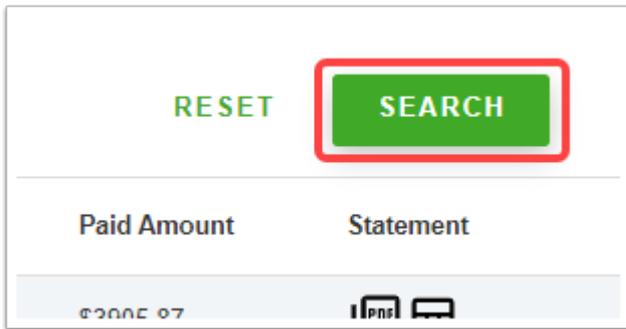
17 18 19 20 21 22 23

24 25 26 27 28 29 30

1 2 3 4 5 6 7

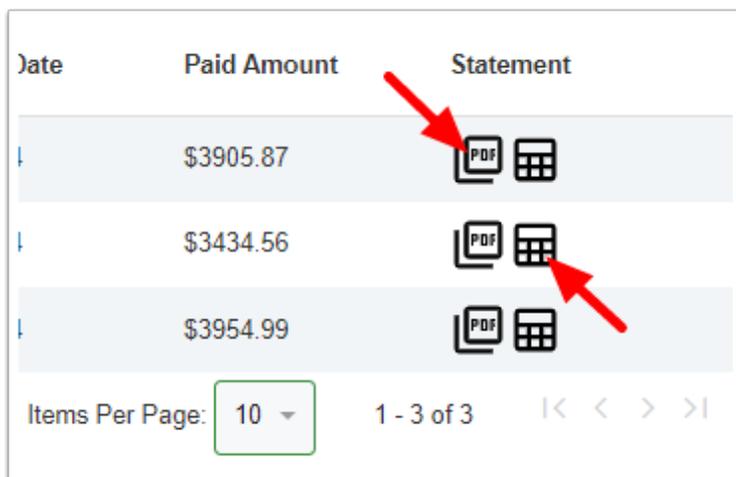
Clear Today

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.



A screenshot of a table with three columns: "Date", "Paid Amount", and "Statement". The table contains three rows of data. The "Statement" column contains PDF and Excel icons. Red arrows point to the PDF icon in the first row and the Excel icon in the second row. Below the table, there is a pagination control showing "Items Per Page: 10", "1 - 3 of 3", and navigation arrows.

Date	Paid Amount	Statement
	\$3905.87	 
	\$3434.56	 
	\$3954.99	 

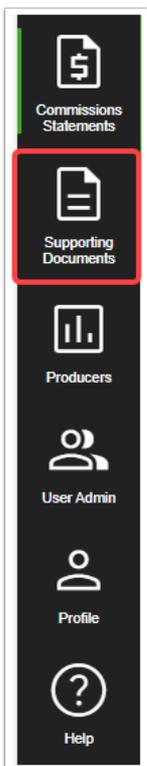
Items Per Page: 10 1 - 3 of 3 |< < > >|

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.

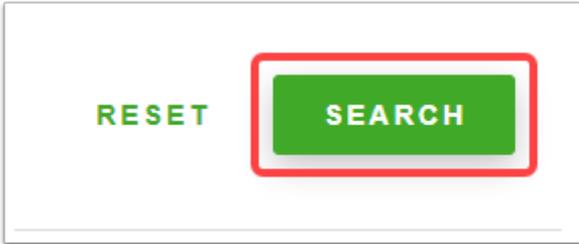
Adjust criteria to further limit your search results.

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.



Supporting Documents

Payer	TIN	Agency Name	NPN	Agent Name	Group ID	Group Name	Contract ID	Contract Start Date	Contract End Date
My Test Agency 1		My Test Agency 1		Test Agent 1 FH Test Agent 1 LN	12005	My Test Group	2112282	11/01/2024	06/30/2025

Items Per Page: 100 1 - 1 of 1

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.

Group Name	Contract ID
My Test Group	2112282



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

Subgroups Information ✕

Group ID: 12005 Group Name: My Test Group Group Status: Active

Subgroup ID	Subgroup Name	Effective Date	Status
1200	My Test Subgroup A	2024-11-01	Active
1201	My Test Subgroup B	2024-11-01	Active
1202	My Test Subgroup C	2024-11-01	Active
1203	My Test Subgroup D	2024-11-01	Active
1204	My Test Subgroup E	2024-11-01	Active

Items Per Page: 10 1 - 7 of 7 << < > >>

CLOSE

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

Supporting Documents

Agency TIN: NPN: Agent Name: Contract As Of Date:
RESET
SEARCH

	Payer	TIN	Agency Name	NPN	Agent Name	Group ID	Group Name	Contract ID	Contract Start Date	Contract End Date
⌵			My Test Agency 1		Test Agent 1 FN Test Agent 1 LN	12005	My Test Group	2112282	11/01/2024	06/30/2025

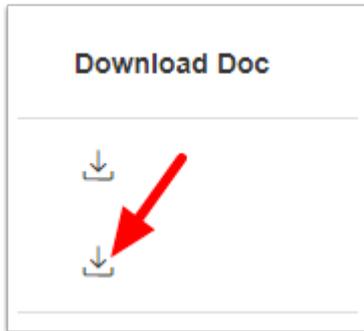
Items Per Page: 100 1 - 1 of 1 << >>

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

Payer	TIN	Agency Name	NPN	Agent Name	Group ID
⌵		My Test Agency 1		Test Agent 1 FN Test Agent 1 LN	12005

Document Name	Upload Date	Download Doc
Dummy Doc Excel 20241113.xlsx	2024-11-21 15:53:26	↓
Doc1 Testing 20241113.docx	2024-11-21 15:57:46	↓

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



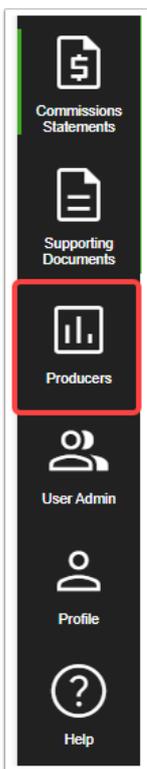
- If you are having trouble downloading a Document, check your settings to ensure that your popup blocker allows downloads from the Producer Toolkit site.

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.

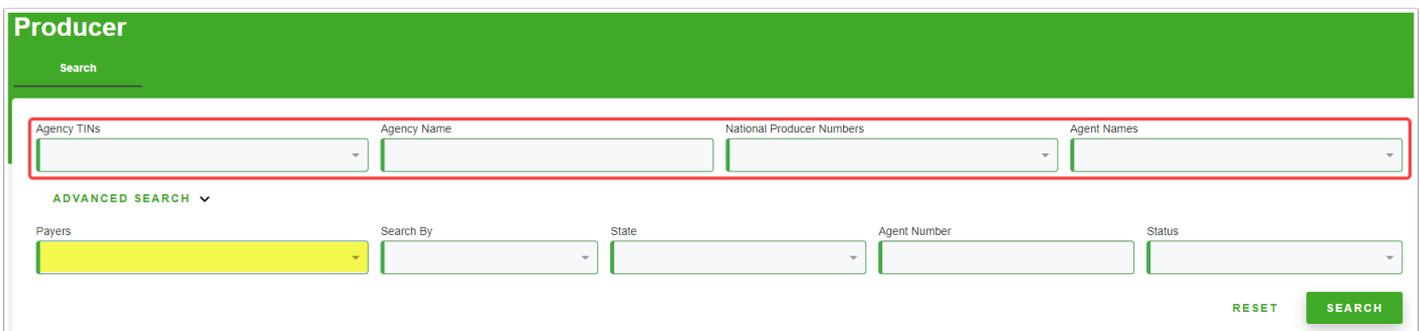
A list of search results will be displayed below the search parameters. Based on your authorizations, you may have access to Book of Business for multiple Producers, or you may have access to only your own Book of Business.

- 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 OR Agency Name OR NPN OR 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.



The screenshot shows the 'Producer' search interface. At the top, there is a green header with the word 'Producer' and a 'Search' button. Below the header, there are four search fields: 'Agency TINs', 'Agency Name', 'National Producer Numbers', and 'Agent Names'. These fields are highlighted with a red border. Below these fields is an 'ADVANCED SEARCH' section with a dropdown arrow. This section contains five fields: 'Payers' (highlighted in yellow), 'Search By', 'State', 'Agent Number', and 'Status'. At the bottom right of the search area, there are 'RESET' and 'SEARCH' buttons.

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.



This close-up shows the 'Agent Names' search field. It contains two entries, each with a red 'x' icon to its left, indicating they can be removed. The entries are 'Test Agent 1 FN Test Agent 1 LN' and 'Test Agent 2 FN Test Agent 2 LN'. A red arrow points to the 'x' icon of the first entry.

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

Payers

x

[Redacted]

x

Search By

x

Agent

x

- Agent
- Agency

Producer Name

- [Test Agent 1 FN Test Agent 1 LN](#)
- [Test Agent 2 FN Test Agent 2 LN](#)

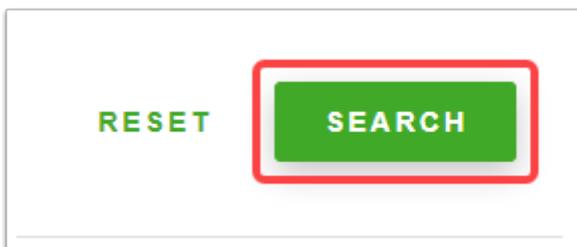
Payer

[Redacted]

[Redacted]

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

Click SEARCH to display updated results.



Agency TINs

Agency Name

National Producer Numbers

Agent Names

[Redacted]

ADVANCED SEARCH >

RESET
SEARCH

Producer Name	Payer	Agency TIN	State License	NPN	Payable to	Status	Eff. Date
> My_Test_Agency_1	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Agency	Active	11/01/2024

Items Per Page: 10
1 - 1 of 1
< > >>

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					Agency	Active	11/01/2024
👤 Test Agent 1 FN Test Agent 1 LN					Agency	Active	11/01/2024
👤 Test Agent 2 FN Test Agent 2 LN					Agency	Active	11/01/2024

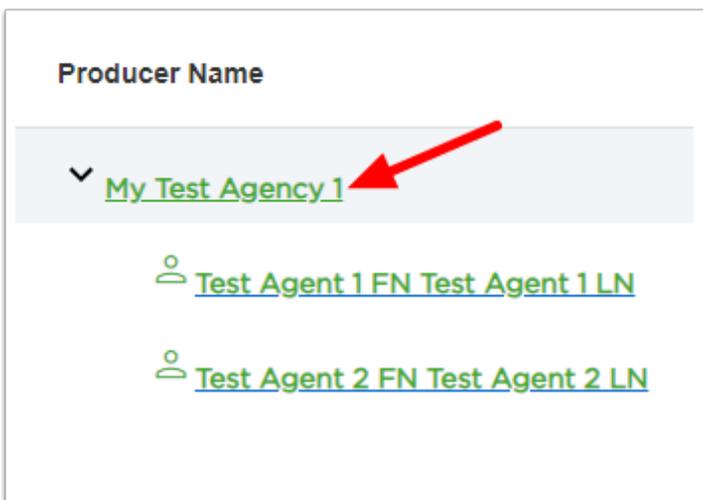
Items Per Page: 1 - 1 of 1 < > >>

👤 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.



<< Back To Results

Book of Business

Group Book of Business Individual Book of Business

Agency Name: My Test Agency 1 | Agency TIN: | NPN: | Agent Name:

State License: MI-LIC01

[EXPORT ALL](#)

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

Items Per Page: 1 - 2 of 2 < >

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.

Producer Name

▼ [My Test Agency 1](#)

[Test Agent 1 FN Test Agent 1 LN](#)

[Test Agent 2 FN Test Agent 2 LN](#)

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.

Producer Name	Payer	Agency TIN	State License	NPN	Payable to	Status	Eff. Date
TestFN StandaloneTestLN					Agent	Active	12/01/2024

Items Per Page: 1 - 1 of 1 < >

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.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	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
2	My Test Agency 1		MI-LIC01		Test Agent 1 FN Test Agent 1 LN			MI	12005	1200		My Test Group	My Test Subgroup A	Dental	11/01/2024			4.75 Standard Percent Based on Group Size	Pay Monthly
3	My Test Agency 1		MI-LIC01		Test Agent 2 FN Test Agent 2 LN			MI	12005	1201		My Test Group	My Test Subgroup B	Dental	11/01/2024			1.2 Standard Percent Based on Group Size	Pay Monthly
4																			

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.

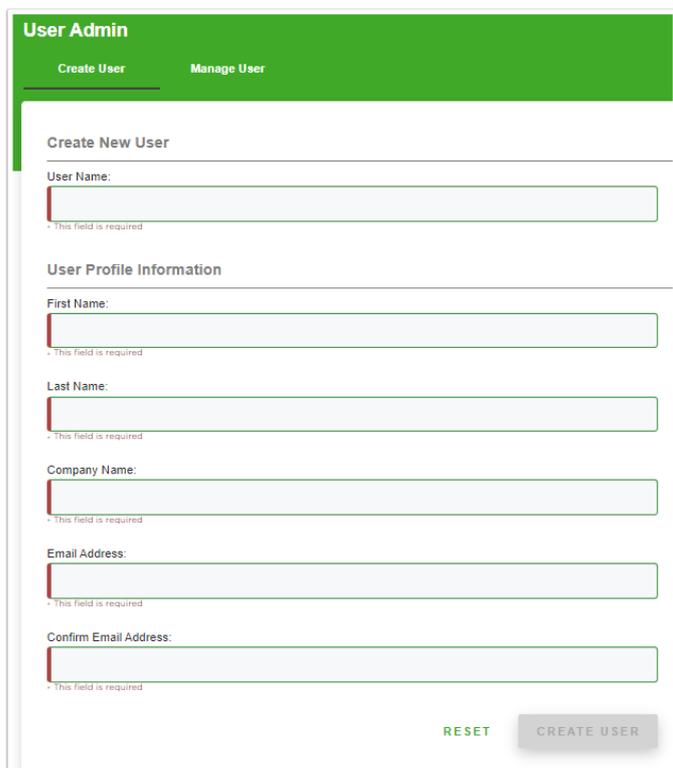
Select User Admin in the left navigation menu.



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.



User Admin

Create User Manage User

Create New User

User Name: * This field is required

User Profile Information

First Name: * This field is required

Last Name: * This field is required

Company Name: * This field is required

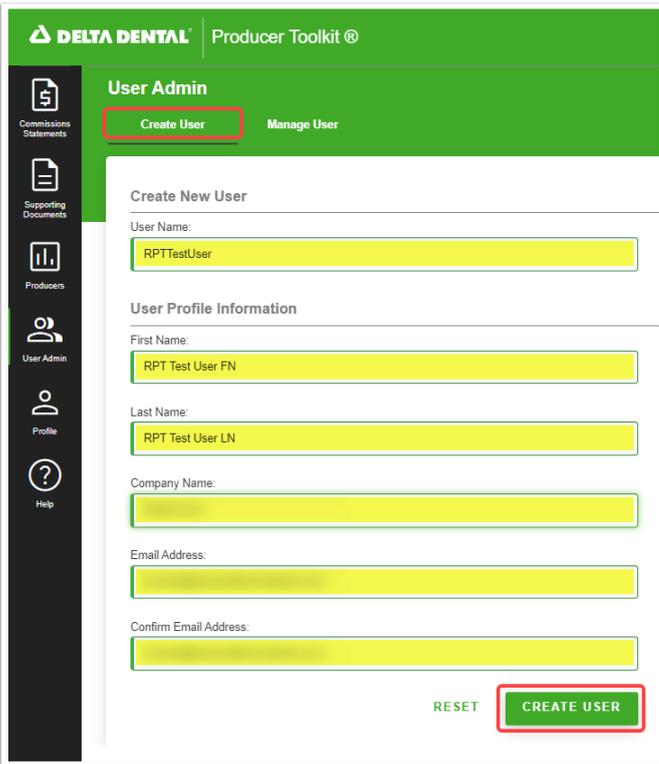
Email Address: * This field is required

Confirm Email Address: * This field is required

RESET CREATE USER

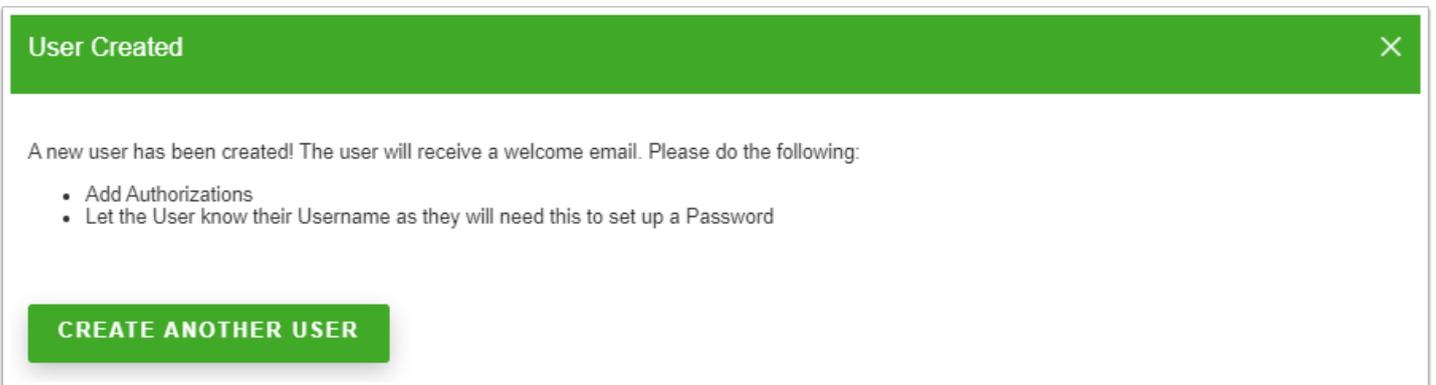
Enter the required information for your new User and Click **CREATE USER**.

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.

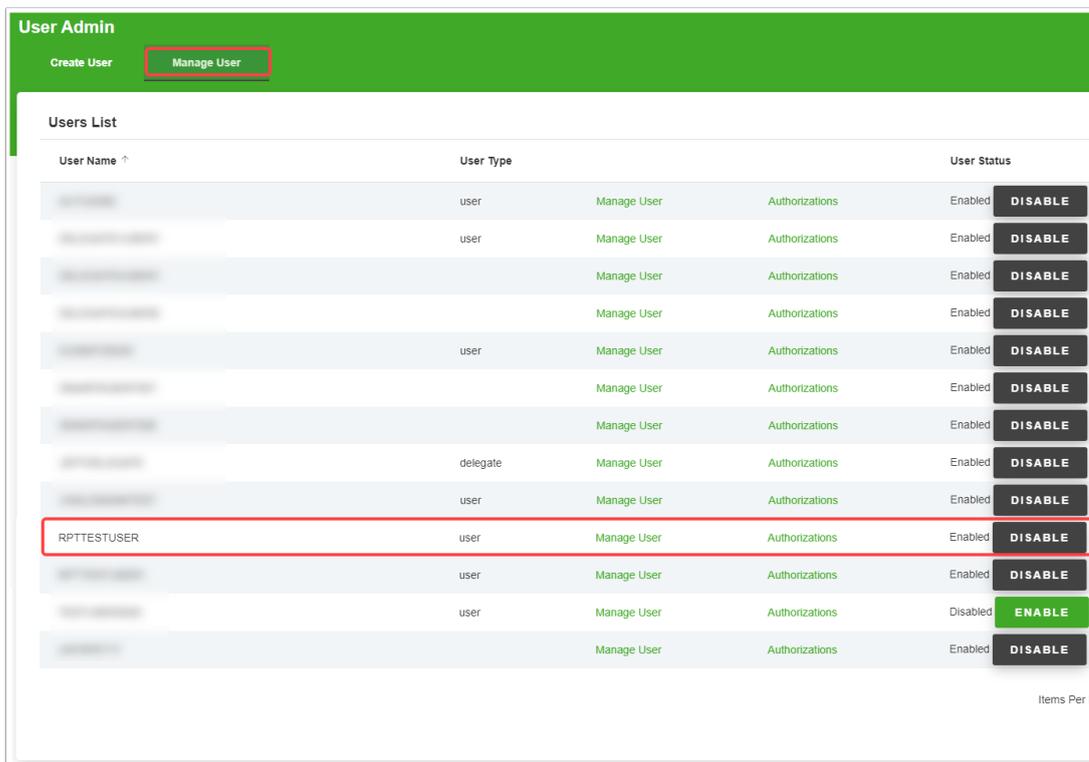
It is recommended that you proceed to [Manage User](#) to add Authorizations so the new User will have what they need to start working within the application.

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.



The screenshot shows the 'User Admin' interface. At the top, there are two buttons: 'Create User' and 'Manage User'. The 'Manage User' button is highlighted with a red box. Below the buttons is a 'Users List' table. The table has columns for 'User Name', 'User Type', 'Manage User', 'Authorizations', 'User Status', and a 'DISABLE' button. The row for 'RPTTESTUSER' is highlighted with a red box. The 'DISABLE' button for this user is also highlighted with a red box.

User Name ↑	User Type	Manage User	Authorizations	User Status	DISABLE
[blurred]	user	Manage User	Authorizations	Enabled	DISABLE
[blurred]	user	Manage User	Authorizations	Enabled	DISABLE
[blurred]		Manage User	Authorizations	Enabled	DISABLE
[blurred]		Manage User	Authorizations	Enabled	DISABLE
[blurred]	user	Manage User	Authorizations	Enabled	DISABLE
[blurred]		Manage User	Authorizations	Enabled	DISABLE
[blurred]		Manage User	Authorizations	Enabled	DISABLE
[blurred]	delegate	Manage User	Authorizations	Enabled	DISABLE
[blurred]	user	Manage User	Authorizations	Enabled	DISABLE
RPTTESTUSER	user	Manage User	Authorizations	Enabled	DISABLE
[blurred]	user	Manage User	Authorizations	Enabled	DISABLE
[blurred]	user	Manage User	Authorizations	Disabled	ENABLE
[blurred]		Manage User	Authorizations	Enabled	DISABLE

Items Per Page

Manage User - Update User Info

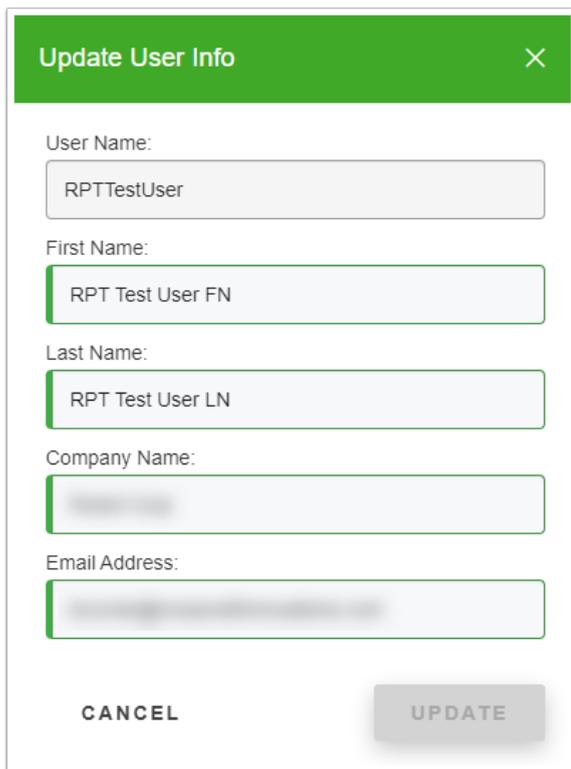
1. Click Manage User.



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

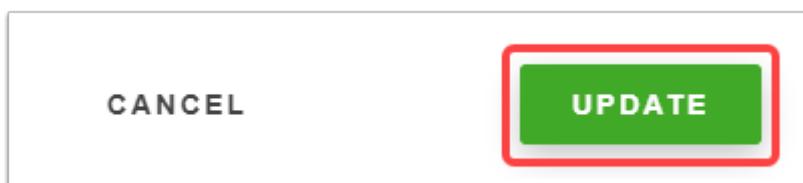
2. Enter your changes to Update User Info fields.

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



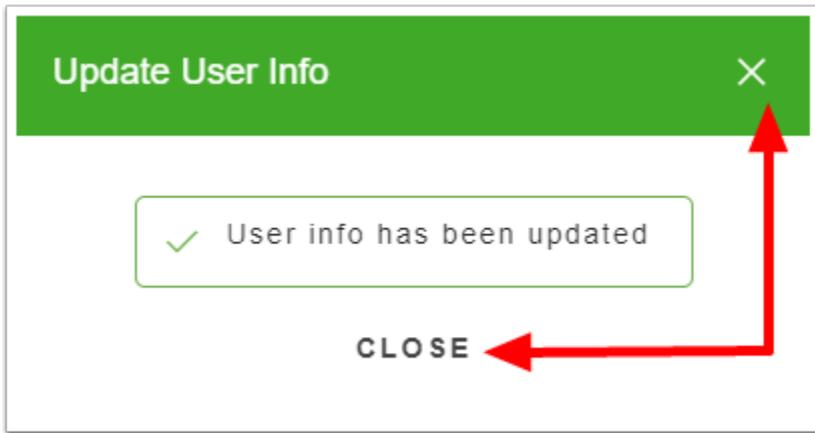
A dialog box titled 'Update User Info' with a green header bar and a close button (X) in the top right corner. The dialog contains several text input fields: 'User Name:' (containing 'RPTTestUser'), 'First Name:' (containing 'RPT Test User FN'), 'Last Name:' (containing 'RPT Test User LN'), 'Company Name:', and 'Email Address:'. At the bottom, there are two buttons: 'CANCEL' and 'UPDATE'. The 'UPDATE' button is highlighted with a red glow.

3. Click UPDATE.



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

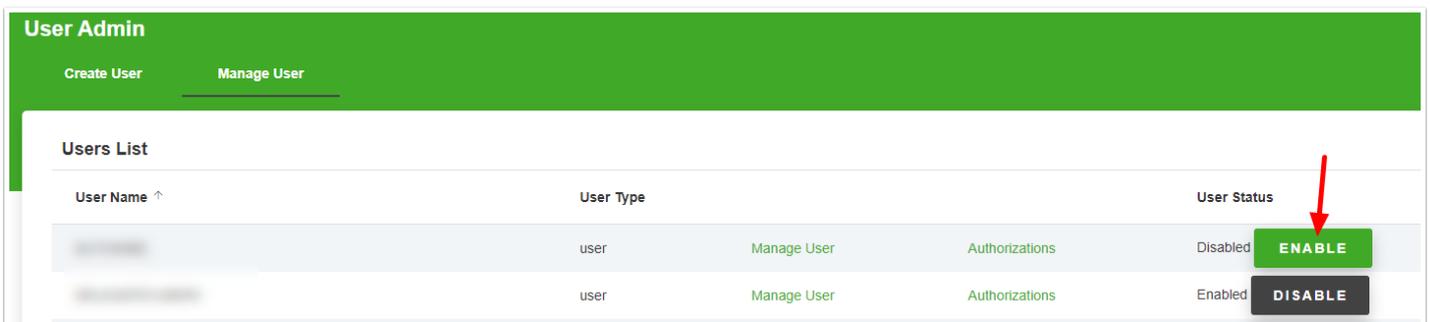
A confirmation is provided that User Info has been updated. Click CLOSE or Click the x in the upper right corner to close this window.



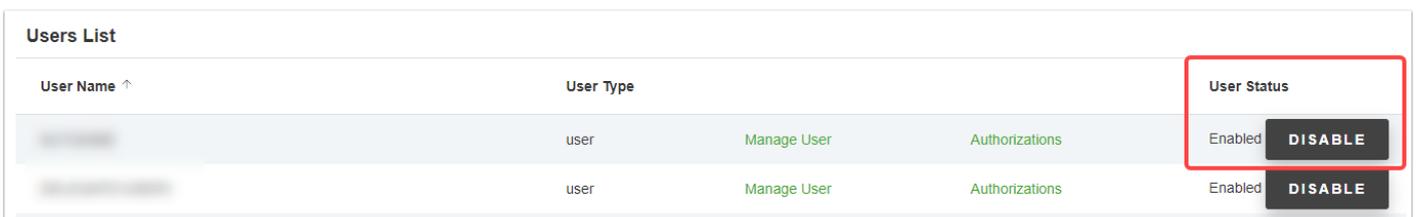
Disable / Enable Users

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.



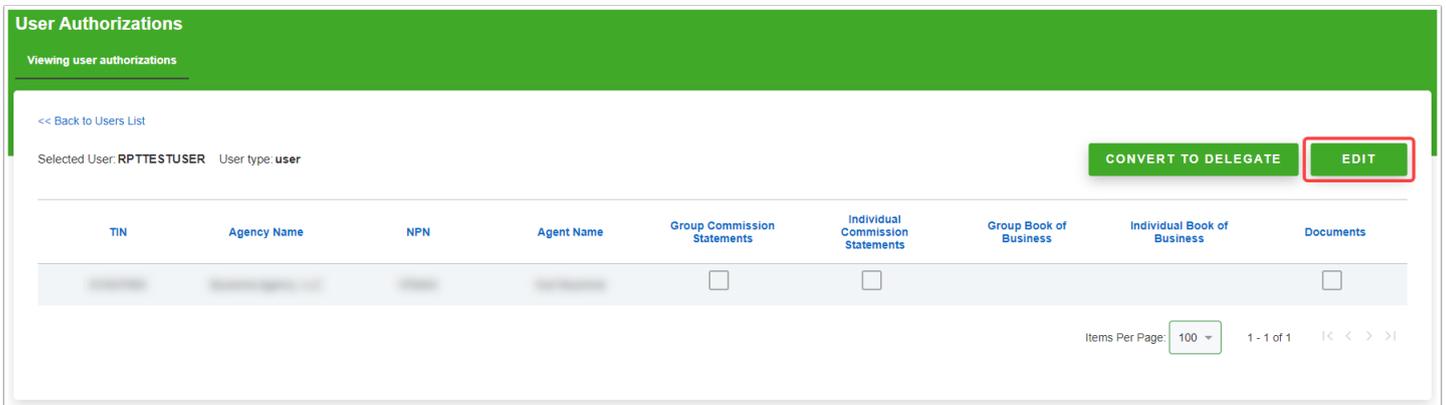
Manage Authorizations

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.

Selected User: RPTTESTUSER User type: user **CANCEL** **SAVE**

TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Items Per Page: 100 1 - 1 of 1 < > >>

SAVE becomes enabled once a configuration has been changed.

4. Click SAVE to commit your changes.

Selected User: RPTTESTUSER User type: user **CANCEL** **SAVE**

TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please SAVE your changes before navigating away from this page. Items Per Page: 100 1 - 1 of 1 < > >>

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.

<< Back to Users List Selected User: RPTTESTUSER User type: user **CONVERT TO DELEGATE** **EDIT**

TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
				<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>

Items Per Page: 100 1 - 1 of 1 < > >>

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.

User Admin

Create User **Manage User**

Users List

User Name ↑	User Type			User Status
CREATEDUSER1	user	Manage User	Authorizations	Enabled DISABLE

Click CONVERT TO DELEGATE.

User Authorizations

Viewing user authorizations

<< Back to Users List

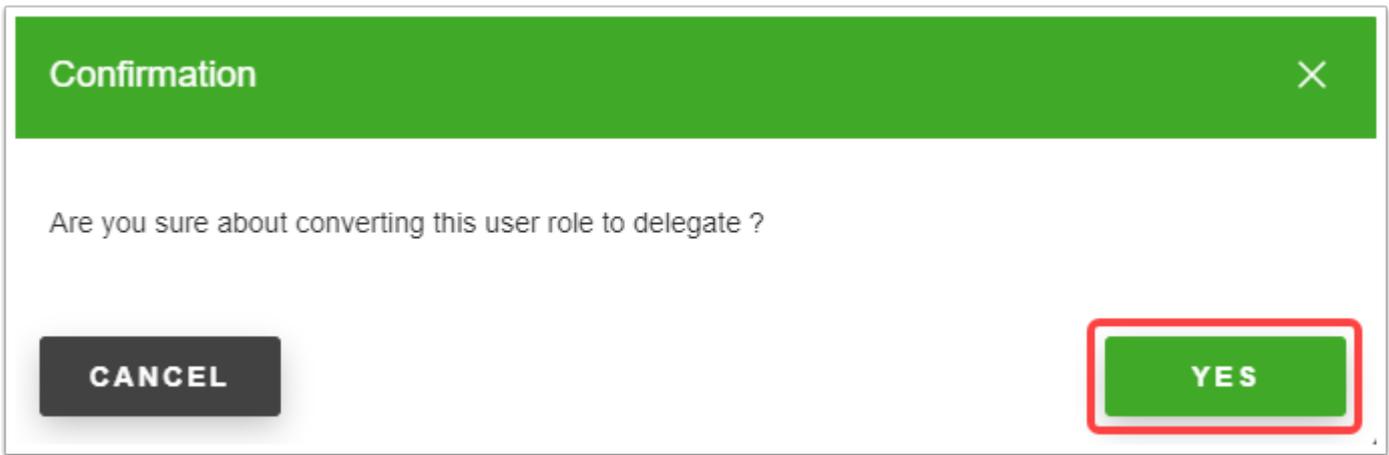
Selected User: CREATEDUSER1 User type: user **CONVERT TO DELEGATE** **EDIT**

TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
	My Test Agency 1		Test Agent 1 FN Test Agent 1 LN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	My Test Agency 1		Test Agent 2 FN Test Agent 2 LN			<input type="checkbox"/>	<input type="checkbox"/>	

Items Per Page: 100 1 - 2 of 2 < > >>

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.

Selected User: **CREATEDUSER1** User type: **delegate** **CONVERT TO USER**

TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
[blurred]	My Test Agency 1		Test Agent 1 FN Test Agent 1 LN	<input checked="" type="checkbox"/>				
[blurred]	My Test Agency 1		Test Agent 2 FN Test Agent 2 LN			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Items Per Page: 100 1 - 2 of 2 < > >>

Click **CONVERT TO USER**.

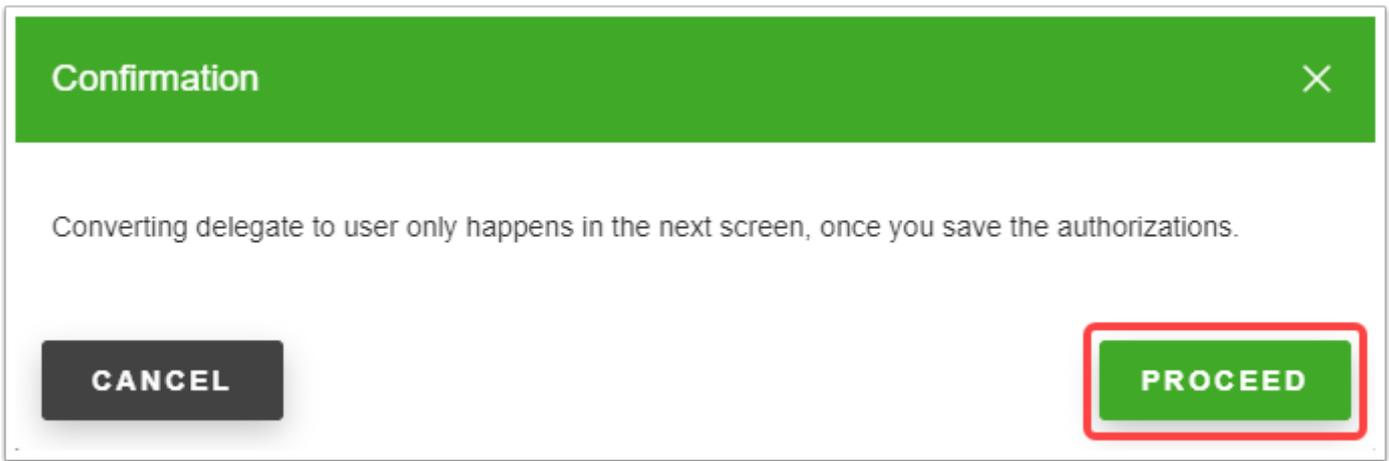
Selected User: **CREATEDUSER1** User type: **delegate** **CONVERT TO USER**

TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
[blurred]	My Test Agency 1		Test Agent 1 FN Test Agent 1 LN	<input checked="" type="checkbox"/>				
[blurred]	My Test Agency 1		Test Agent 2 FN Test Agent 2 LN			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Items Per Page: 100 1 - 2 of 2 < > >>

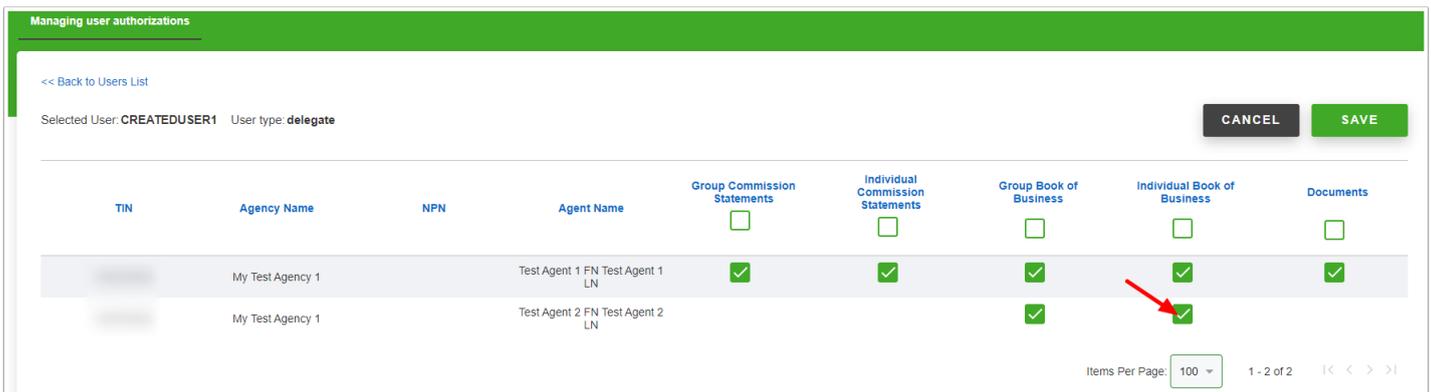
Click **PROCEED**.

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.

Selected User: **CREATEDUSER1** User type: **delegate** **CANCEL** **SAVE**

TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
	My Test Agency 1		Test Agent 1 FN Test Agent 1 LN	<input checked="" type="checkbox"/>				
	My Test Agency 1		Test Agent 2 FN Test Agent 2 LN			<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Please **SAVE** your changes before navigating away from this page. Items Per Page: 100 1 - 2 of 2 < > >>

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

Selected User: **CREATEDUSER1** User type: **user** **CONVERT TO DELEGATE** **EDIT**

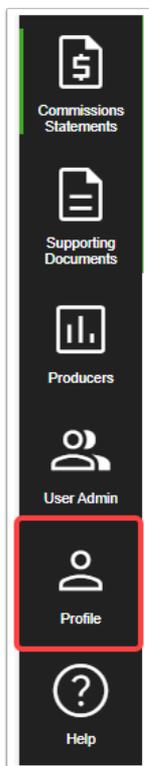
TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
	My Test Agency 1		Test Agent 1 FN Test Agent 1 LN	<input checked="" type="checkbox"/>				
	My Test Agency 1		Test Agent 2 FN Test Agent 2 LN			<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Items Per Page: 100 1 - 2 of 2 < > >>

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.

View your own Producer Toolkit Authorizations in the Authorization tab.

TIN	Agency Name	NPN	Agent Name	Group Commission Statements	Individual Commission Statements	Group Book of Business	Individual Book of Business	Documents
[Redacted]	My Test Agency 1		Test Agent 1 FN Test Agent 1 LN	<input checked="" type="checkbox"/>				
[Redacted]	My Test Agency 1		Test Agent 2 FN Test Agent 2 LN	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Change your Producer Toolkit Password in the Password Management tab.

Profile

Authorization | **Password Management** | Login Authentication

Current Password:

New Password:

Confirm Password:

- This field is required
- Must contain a lowercase character
- Must contain a number
- This field is required
- Must contain one of the follow \$@!%?&_#
- Must contain an uppercase character

CANCEL **SUBMIT**

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

Current Password:

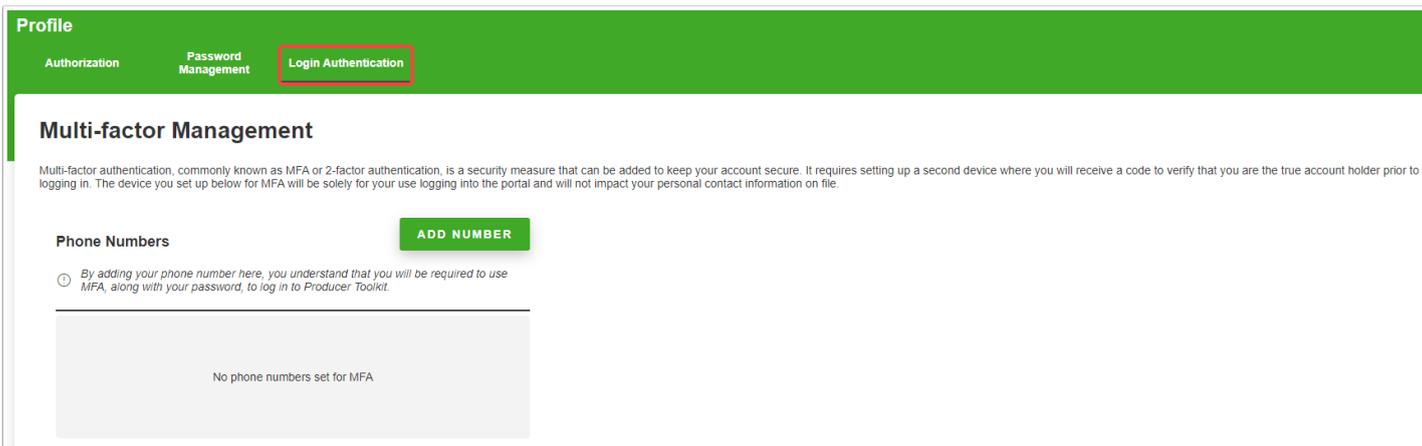
New Password:

Confirm Password:

CANCEL **SUBMIT**

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

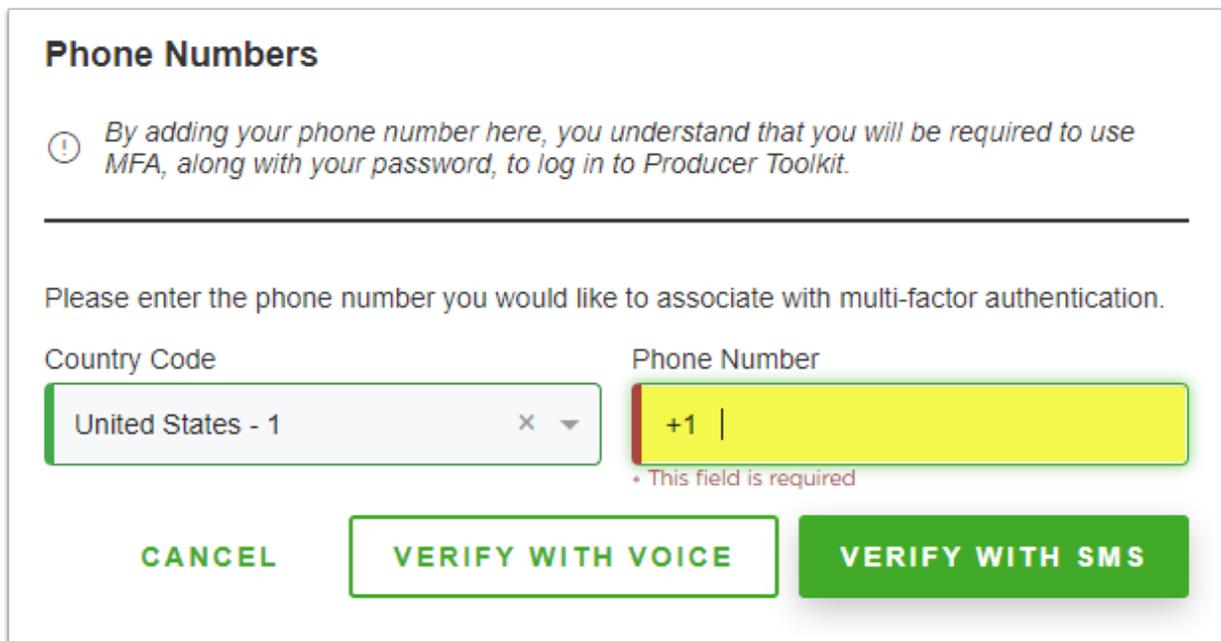
Set up Producer Toolkit Multi-Factor Authentication in the Login Authentication tab.



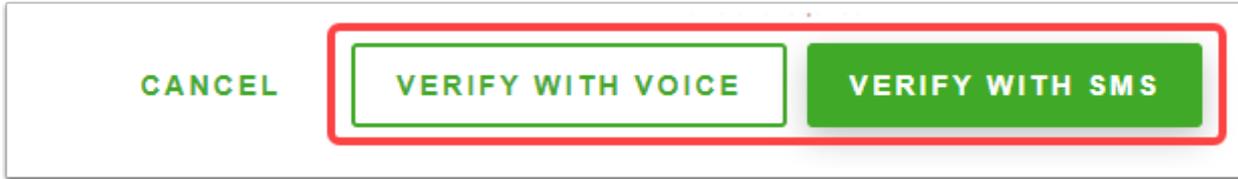
1. Click ADD NUMBER



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.

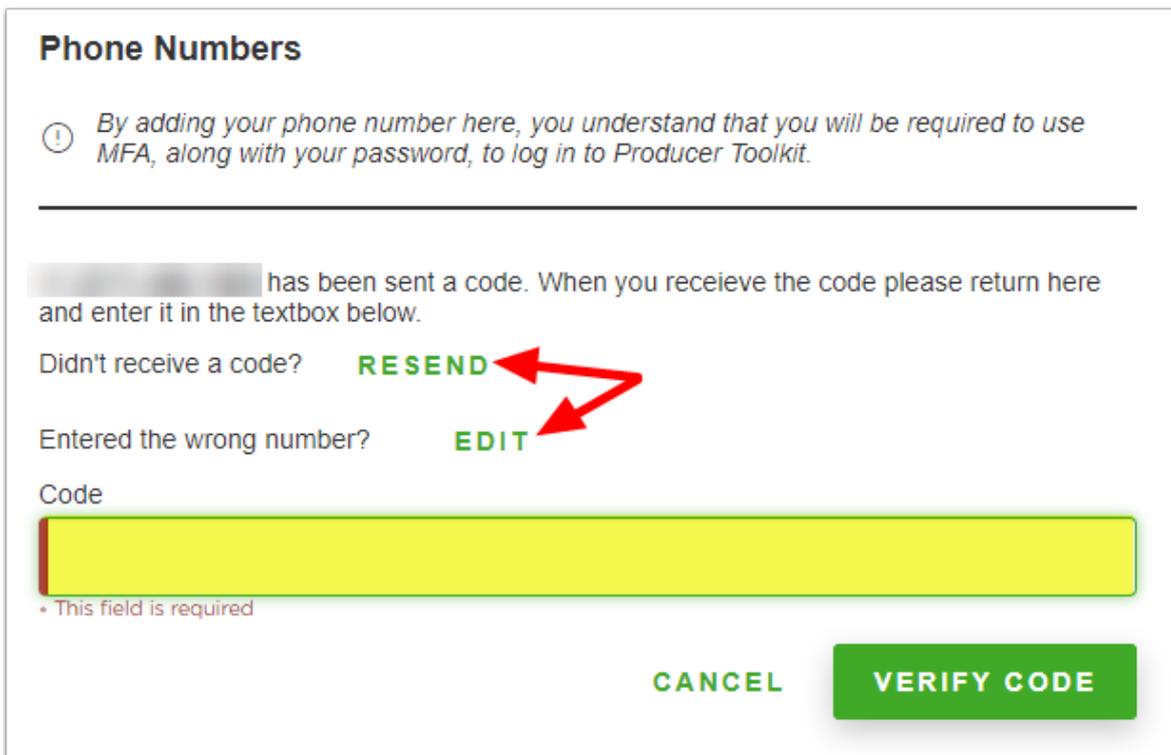


CANCEL **VERIFY WITH VOICE** **VERIFY WITH SMS**

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.



Phone Numbers

 *By adding your phone number here, you understand that you will be required to use MFA, along with your password, to log in to Producer Toolkit.*

 has been sent a code. When you receive the code please return here and enter it in the textbox below.

Didn't receive a code? **RESEND**

Entered the wrong number? **EDIT**

Code

* This field is required

CANCEL **VERIFY CODE**

5. Click VERIFY CODE.

Code

CANCEL 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.

Profile

Authorization Password Management Login Authentication

Multi-factor Management

Multi-factor authentication, commonly known as MFA or 2-factor authentication, is a security measure that can be added to keep your account secure. It requires setting up a second device where you will receive a code to verify that you are the true account holder prior to logging in. The device you set up below for MFA will be solely for your use logging into the portal and will not impact your personal contact information on file.

Phone Numbers

By adding your phone number here, you understand that you will be required to use MFA, along with your password, to log in to Producer Toolkit.

REMOVE

You may click REMOVE to remove the Login Authentication requirement.

Phone Numbers

By adding your phone number here, you understand that you will be required to use MFA, along with your password, to log in to Producer Toolkit.

REMOVE

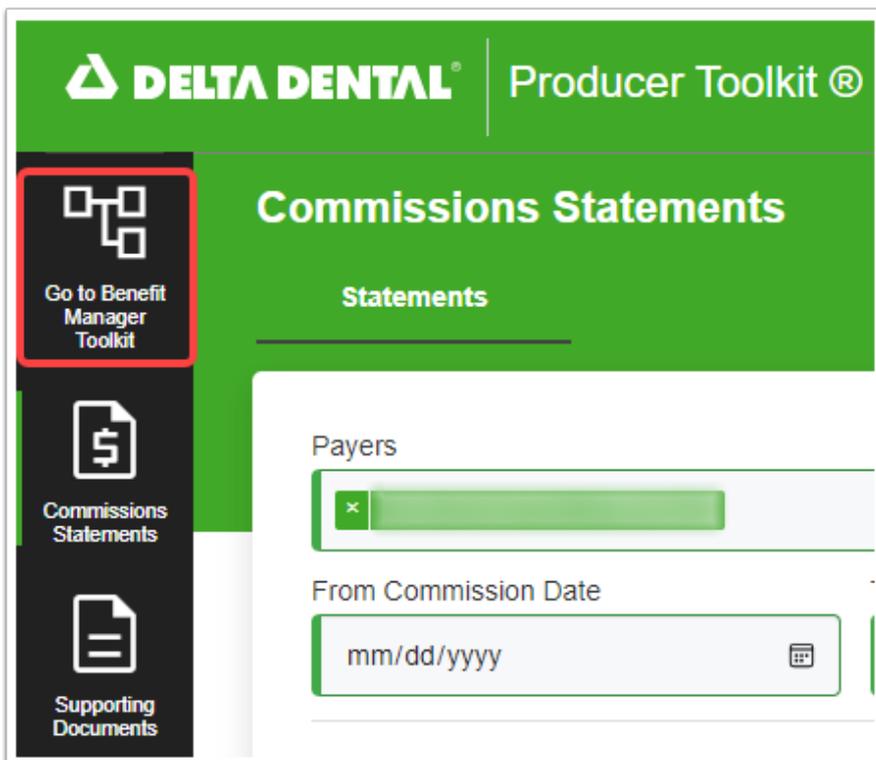
How to Switch from Producer Toolkit to Benefit Manager Toolkit

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.



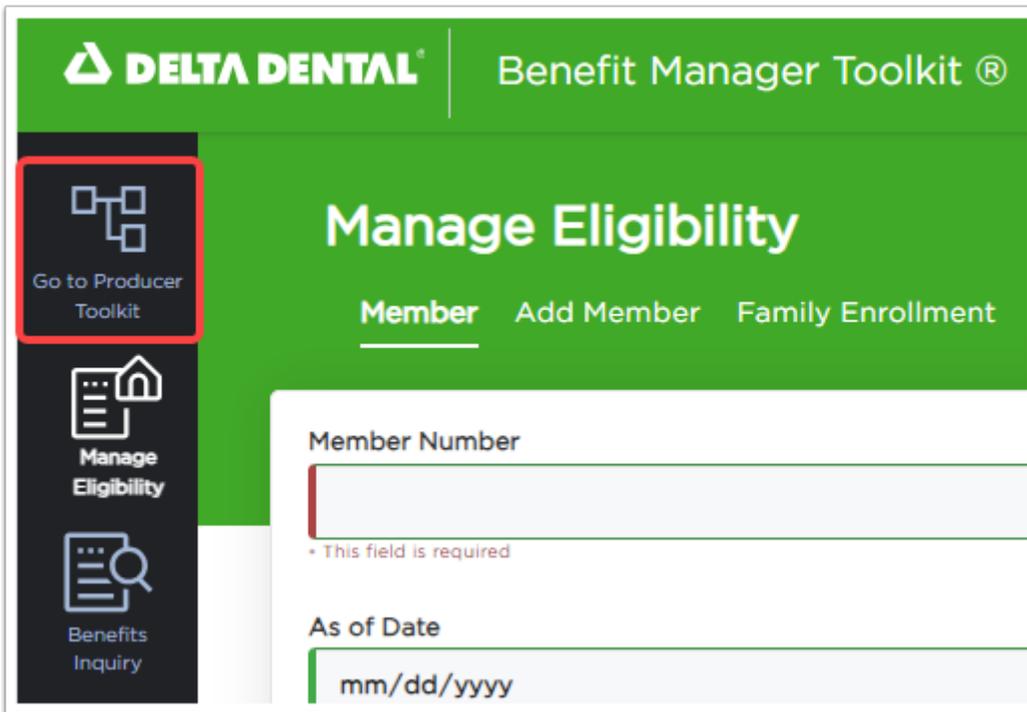


DELTA DENTAL | Producer Toolkit ®

Go to Benefit Manager Toolkit

You will be redirected to Benefit Manager Toolkit in new window.
If you are not redirected, make sure you don't have pop-ups blocked on this webpage or please click on this link [Benefit Manager Toolkit](#)

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



DELTA DENTAL | Benefit Manager Toolkit ®

Go to Producer Toolkit

Manage Eligibility

Benefits Inquiry

Manage Eligibility

Member Add Member Family Enrollment

Member Number

* This field is required

As of Date

- 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.