

Dental Office Toolkit®

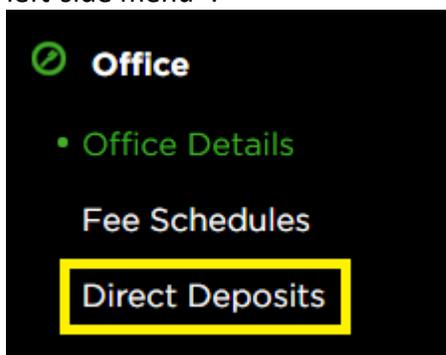
Direct Deposit (EFT) Sign-up

Signing up for direct deposit using the Dental Office Toolkit is quick and easy! Follow these instructions to set your office up to receive payments by direct deposit (EFT).

PLEASE NOTE!

You must have the “EFT User” role assigned to your Dental Office Toolkit username to manage direct deposit (EFT) information for your office. If you do not have this role assigned, please contact the account administrator for your office.

- 1) Log in to your Dental Office Toolkit account, or register for a free account, [here](#).
- 2) Once you have logged in, navigate to the “Direct Deposits” link in the Office section of the left-side menu*:

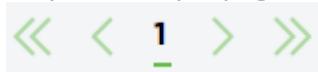


*Only available to Dental Office Toolkit users with the “EFT User” role assigned.

- 3) If any offices associated to your business are already signed up for direct deposit, they will be displayed here. If there are no direct deposits set up, you will see an announcement telling you this. To set up direct deposit for an office that does not currently have it, click the register link in the upper-right corner:

[⊕ Register for Direct Deposit](#)

- 4) Select the checkbox(es) for the office(s) you would like to set up for direct deposit. If you have multiple bank accounts for your offices, individual direct deposits will need to be set up for each bank account. Select ONLY the offices that apply to that particular bank account. There may be multiple pages of offices; use the arrows to the right to page through the list.



5) Enter the required information in the boxes below the office list:

- Your name (person keying in information)
- Name on account (as it appears on bank account)
- Bank or financial institution name
- Account type
- Routing number (confirm)
- Account number (confirm)

6) Select National or Non-national EFT.

- National EFT allows Delta Dental to share your direct deposit information with the Delta Dental Plans Association. This allows the dental office to receive payments via direct deposit from all Delta Dental member companies. Additionally, National EFT users can access payment information from other, non-Dental Office Toolkit Delta Dental member companies on the [Delta Dental Plans Association's National Portal](#).
- Non-national EFT allows Delta Dental of Michigan, Ohio, and Indiana to utilize your direct deposit information to send payments from our affiliated member companies via EFT. Payment information for these entities is available on the Dental Office Toolkit.

The list of payors includes:

- Delta Dental of Michigan
- Delta Dental of Ohio
- Delta Dental of Indiana
- Delta Dental of North Carolina
- Delta Dental of Arkansas
- Delta Dental of Kentucky
- Delta Dental of Nebraska
- Delta Dental of New Mexico
- Delta Dental of Minnesota
- Delta Dental of Tennessee
- Delta Dental of Wisconsin (Medicare plans ONLY)
- Federal Government Programs (EFT information available in the [FGP Dental Office Toolkit](#))

7) You will be asked to verify all information previously entered. Select the checkbox below the displayed information to agree to the direct deposit terms and conditions.

8) Click the "ACCEPT" button and you will be taken to the direct deposit confirmation page.

Direct deposit typically takes ten days to go through the pre-note period while Delta Dental verifies your banking information. Once this period has lapsed, your office will begin receiving payments from the above list of payors. If you have selected National EFT, your direct deposit information will also be shared with the Delta Dental Plans Association so that other Delta Dental member companies can pay your office via direct deposit.

Additional resources can be found in the "Help" link of the admin section of the left-side menu of Dental Office Toolkit. The help video to sign up for direct deposit is available [here](#).