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RENAISSANCE DENTAL OFFICE TOOLKIT

How-to Guides

All names, dates of birth, claims and history included in this guide are fictitious and not representative of an actual person

Last Revised: October 2025

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This Renaissance Dental Office Toolkit® (RDOT) training guide assumes that the users are operating according to the below system requirements:

- Ensure you have the latest version of Google Chrome and Adobe Acrobat Reader downloaded.
- Download the latest version of Google Chrome here
- Download the latest version of Adobe Acrobat here
- Ensure that you have pop-ups enabled for https://www.rendentalofficetoolkit.com/dot-ui/login. Pop-ups will only be used to display a printable format of benefits, routine procedures, etc.
- To view a full list of system requirements the new Toolkit will require, please click here

COMMON QUESTIONS

- RDOT Registration
- Reset Password
- User Management
- My Profile Details
- Multi-Factor Authentication
- Allow Pop-Ups and Cookies in Google Chrome

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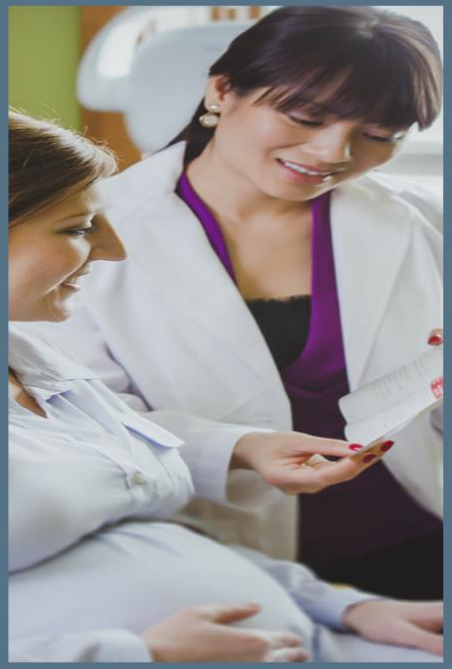
RDOT Registration

Renaissance Dental Office Toolkit

1 Getting Ready — 2 Provider Details — 3 One Time Passcode — 4 User Details — 5 Done!



Am I ready to register?

In order to register, you must know the following information for your Dental Provider:

- Do I know my Provider License Number?
- Do I know the State in which my Provider is Licensed?
- Do I know my business Tax Identification Number?
- Do I know my Service Office ZIP Code?
- Do I have access to the E-mail Address on file with our Provider Records Department?*

If you have all of the above information, then you can continue the registration process by selecting the **NEXT STEP** button below.

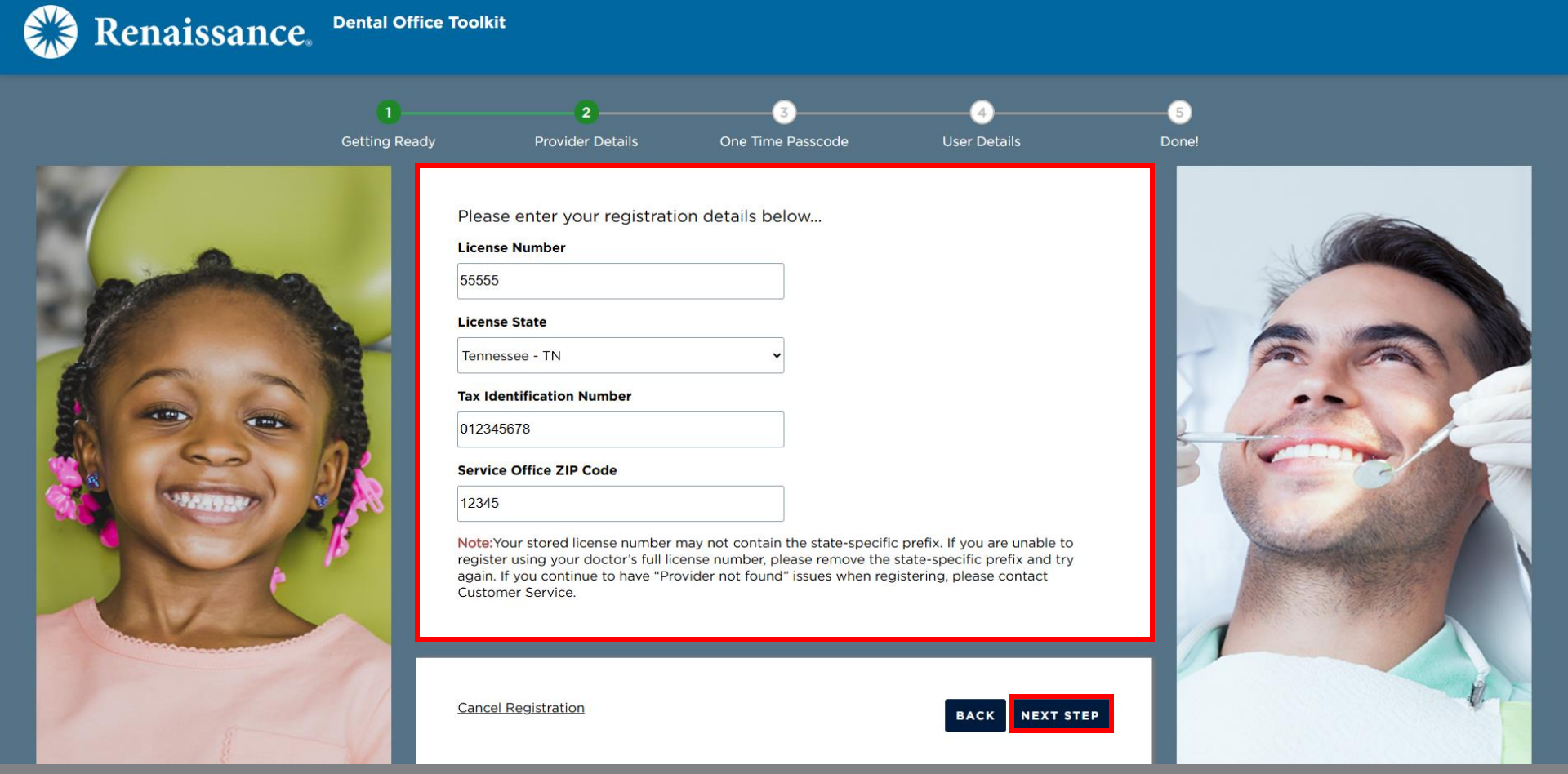
* NOTE FOR LARGE CORPORATIONS WITH A CENTRALIZED E-MAIL ADDRESS:

As part of the registration process, a one-time passcode is sent to the E-mail Address on file with our Provider Records Department. You must have access to the E-mail Address on file, directly or through another person, to complete registration.

Cancel Registration

NEXT STEP

1. Navigate to your local Delta Dental website and click Sign Up under the Dental Office Toolkit section
2. Make sure the provider has their license number, state in which provider is Licensed, TIN, service office ZIP code, and contact information before clicking on “Next Step”



3. Ensure the provider accurately types in the license number, state in which provider is licensed, TIN, and service office ZIP code and then click “Next Step”

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1 Getting Ready — 2 Provider Details — 3 One Time Passcode — 4 User Details — 5 Done!

One Time Passcode

You must verify that you are authorized to register as a Dental Office Toolkit user.

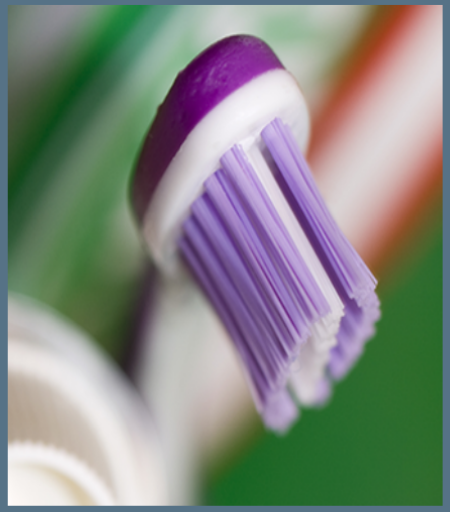
Your One Time Passcode will be sent to the following e-mail address: **(user's email address on file)**

When you are ready, select the "SEND PASSCODE NOW" button to receive your passcode.

Requester Name: Name

Cancel Registration

SEND PASSCODE NOW



REN REN DOCS Contact Us

4. Enter your name in the "Requester Name" box and click "Send Passcode Now"


Dental Office Toolkit One-time Passcode

NR

no-reply@RenaissanceFamily.com

To

Dear Name,

Someone at Service Office ZIP code: is trying to register for the Dental Office Toolkit.

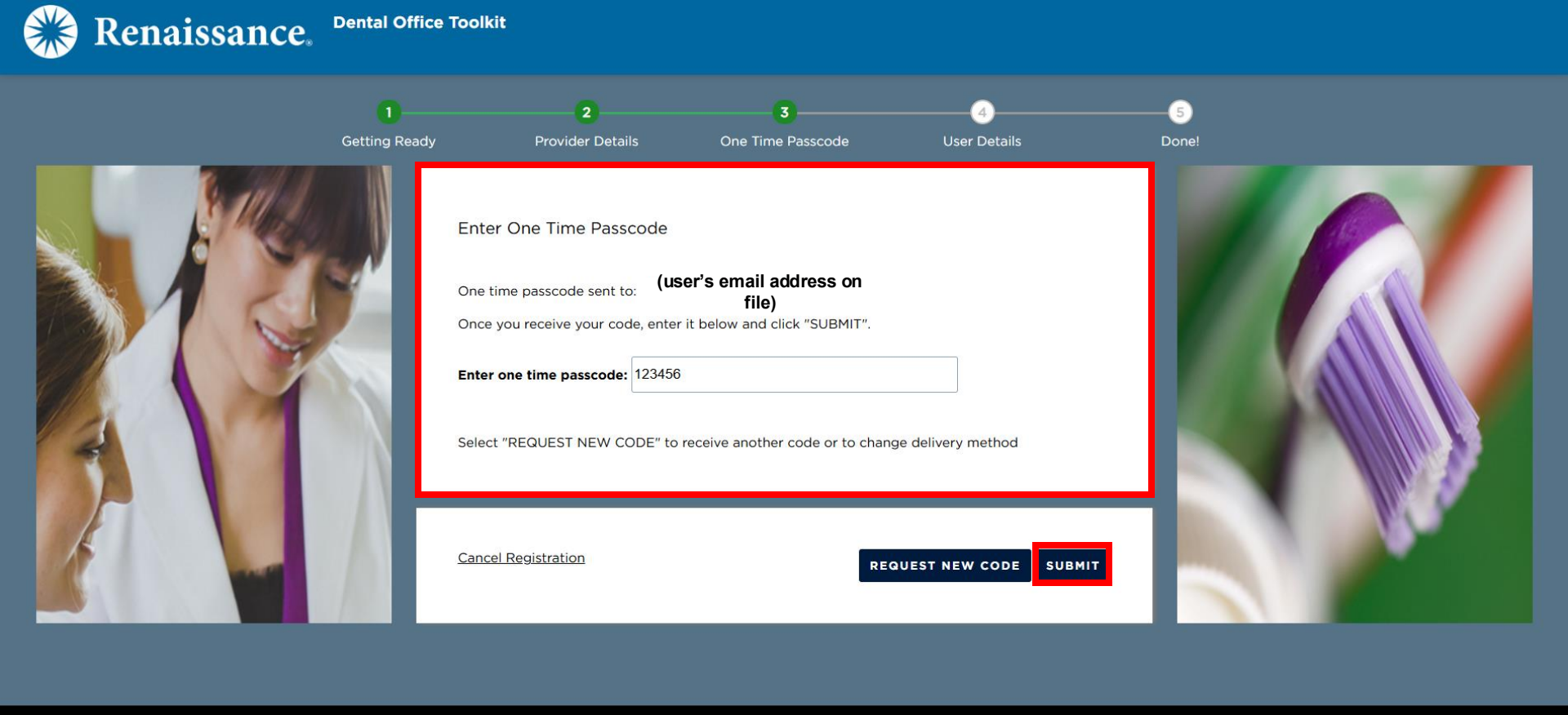
The time-sensitive, one-time passcode for registration is:

525893

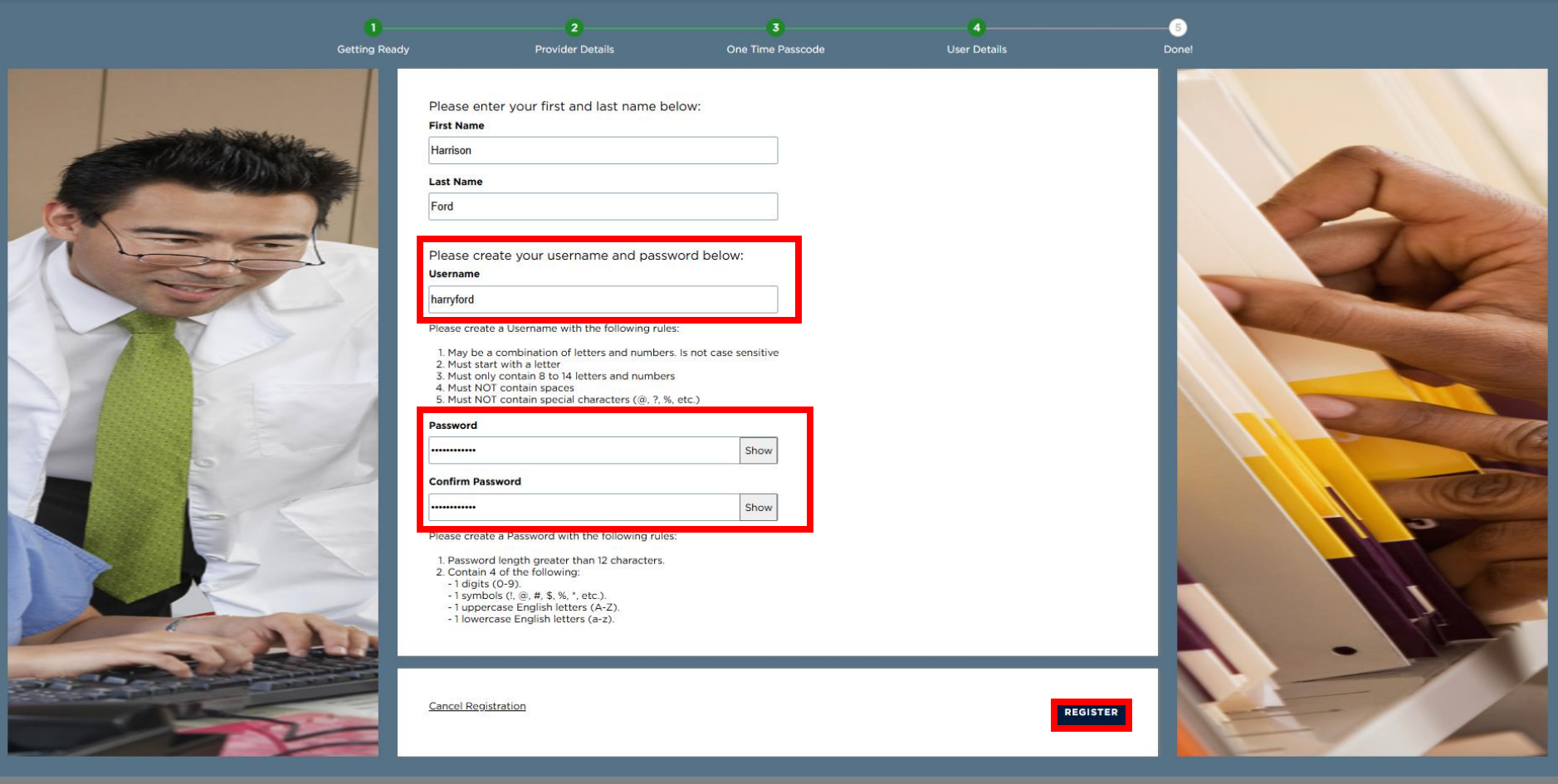
Thank you,

Dental Office Toolkit® Team

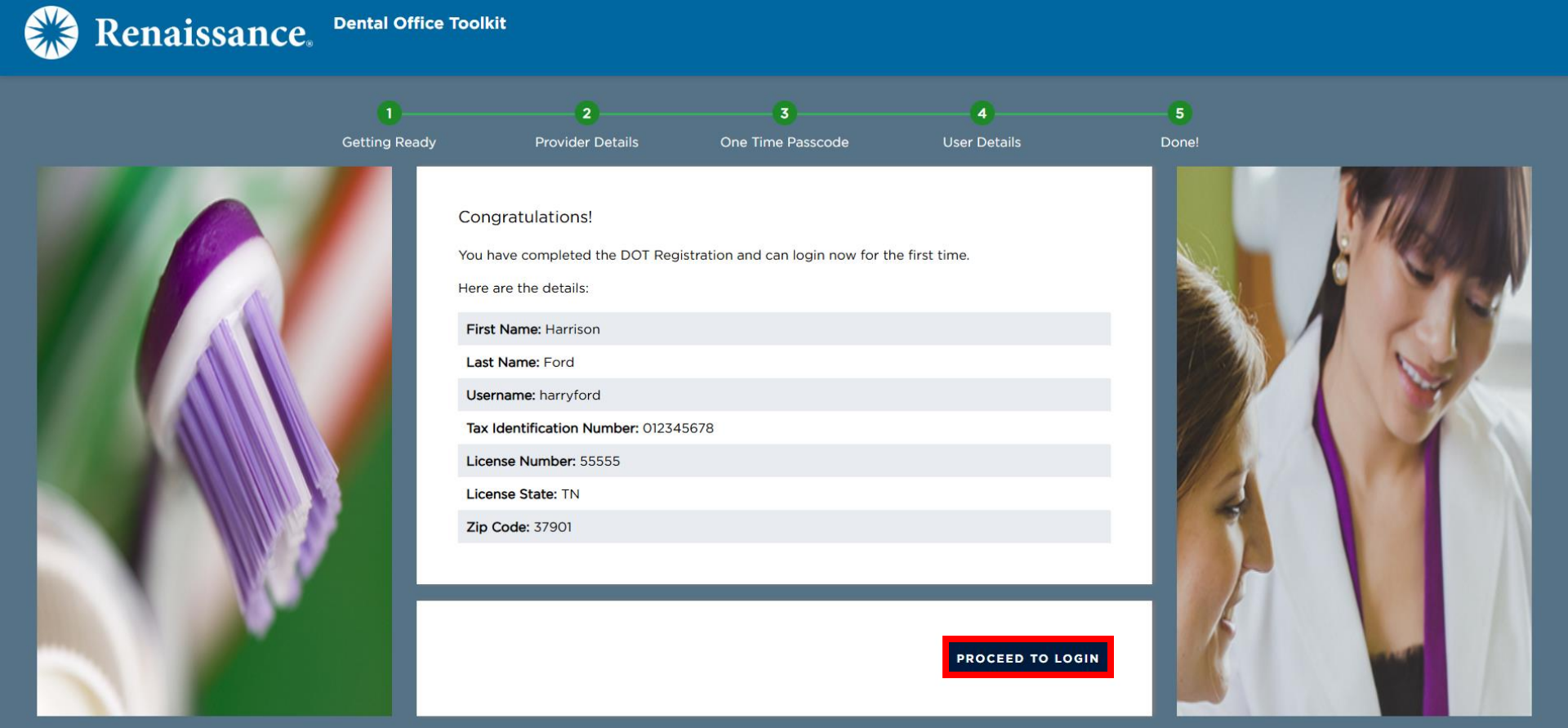
NOTE: You should receive the one time passcode in an email like this



5. Enter the one-time passcode you received to the phone number or email address selected
6. Click "Submit"



7. Ensure the provider completes all fields and meets necessary username and password requirements
8. Click “Register”



9. Confirm all details above are correct and click “Proceed to Login”

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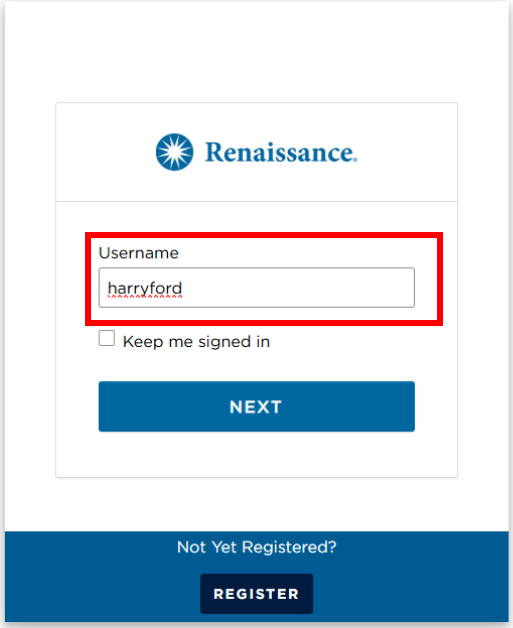
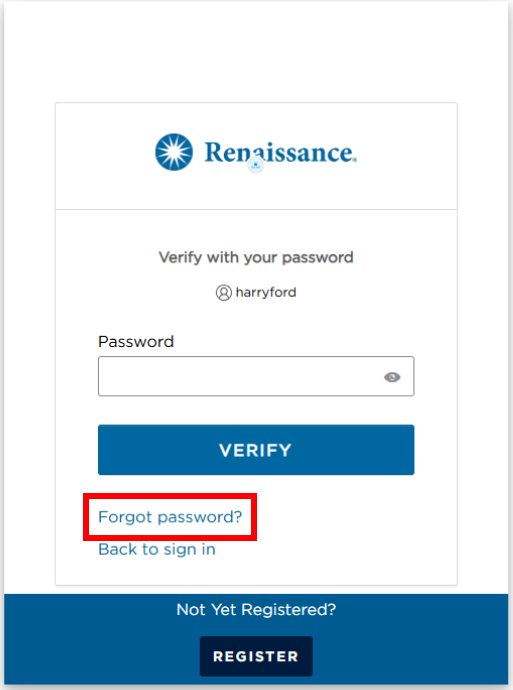
Reset Password

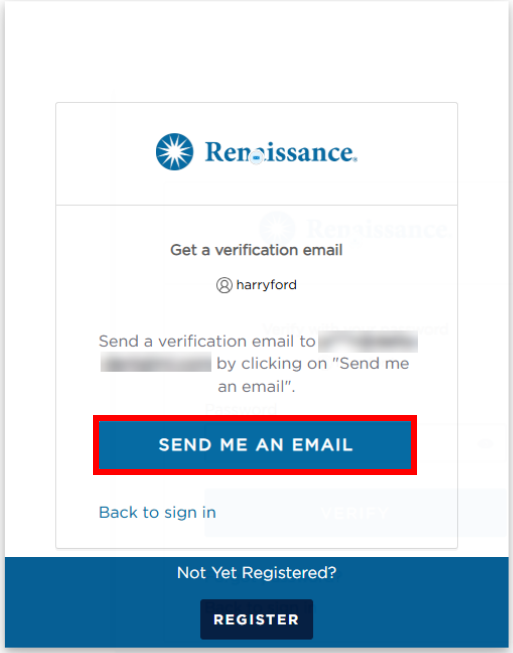


2. On the RDOT login screen, enter your Username, and click "Next"



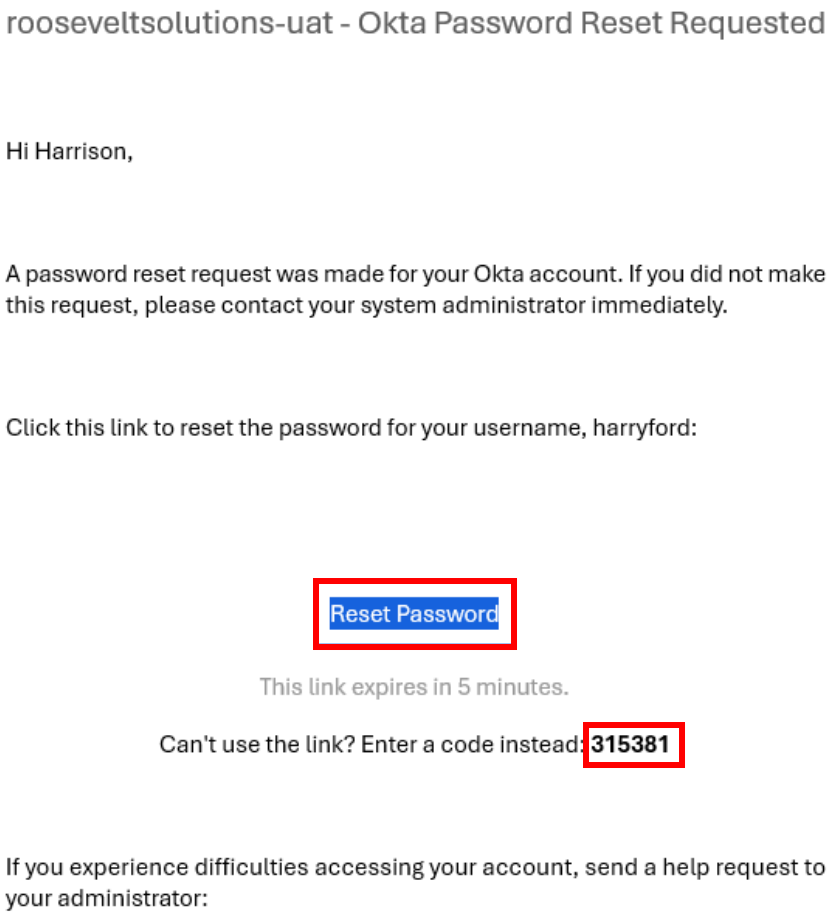
How to Register Your Account and Log In

3. Click "Forgot Password?"

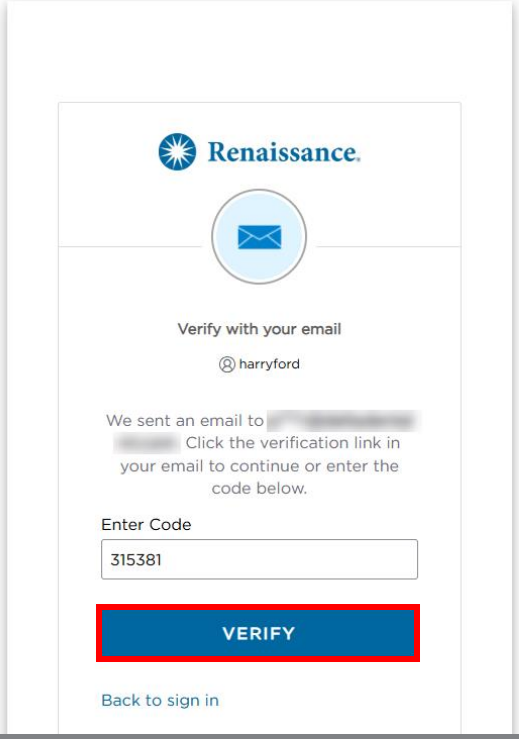


How to Register Your Account and Log In

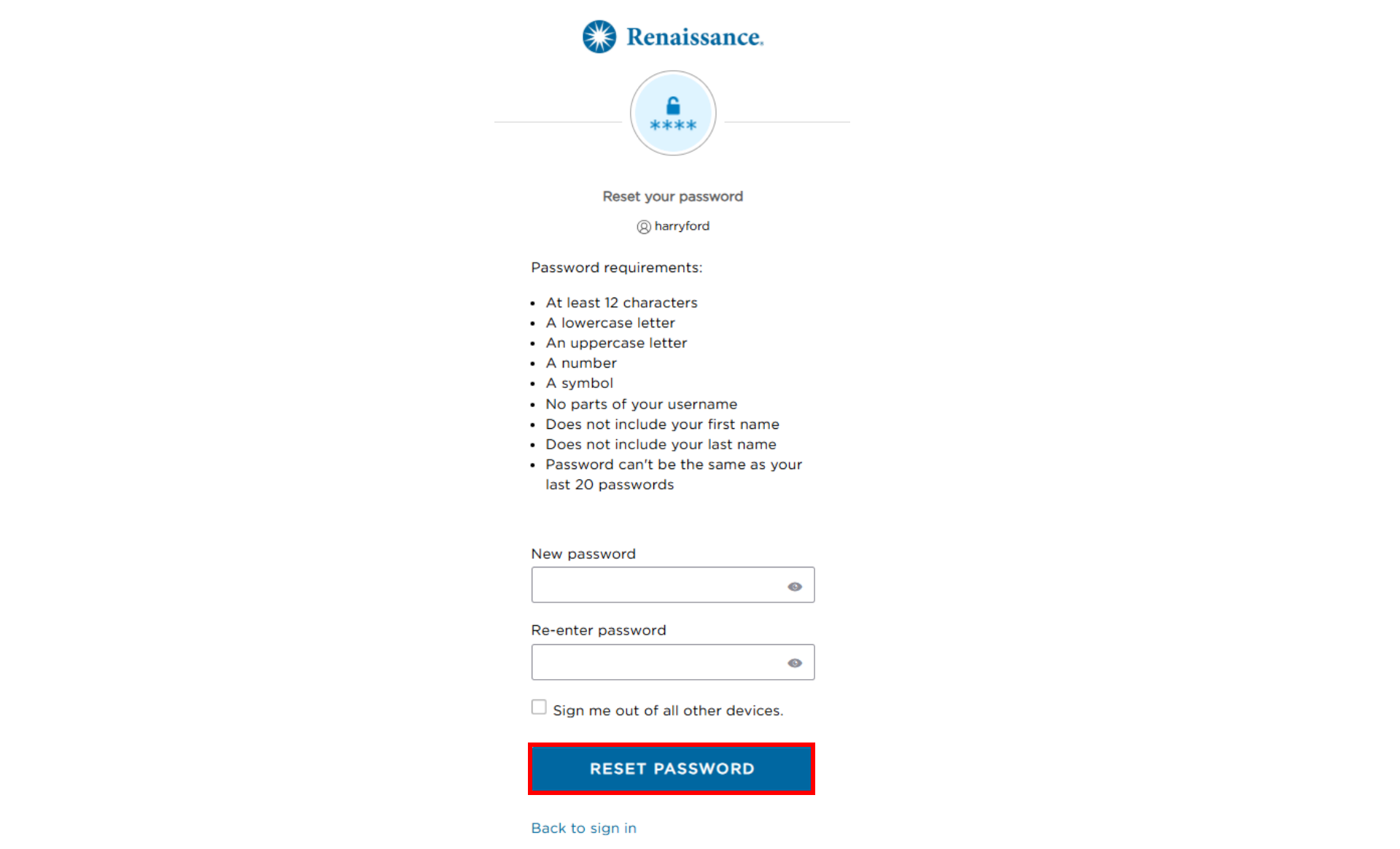
4. Click "Send Me An Email" and the authentication code will be sent to the email listed



5. An email will be sent to the email address listed in Step 4. You can click “Reset Password” or use the code listed.



6. Enter the code from the email and click “Verify”



7. Enter and re-enter your new password and click “Reset Password”

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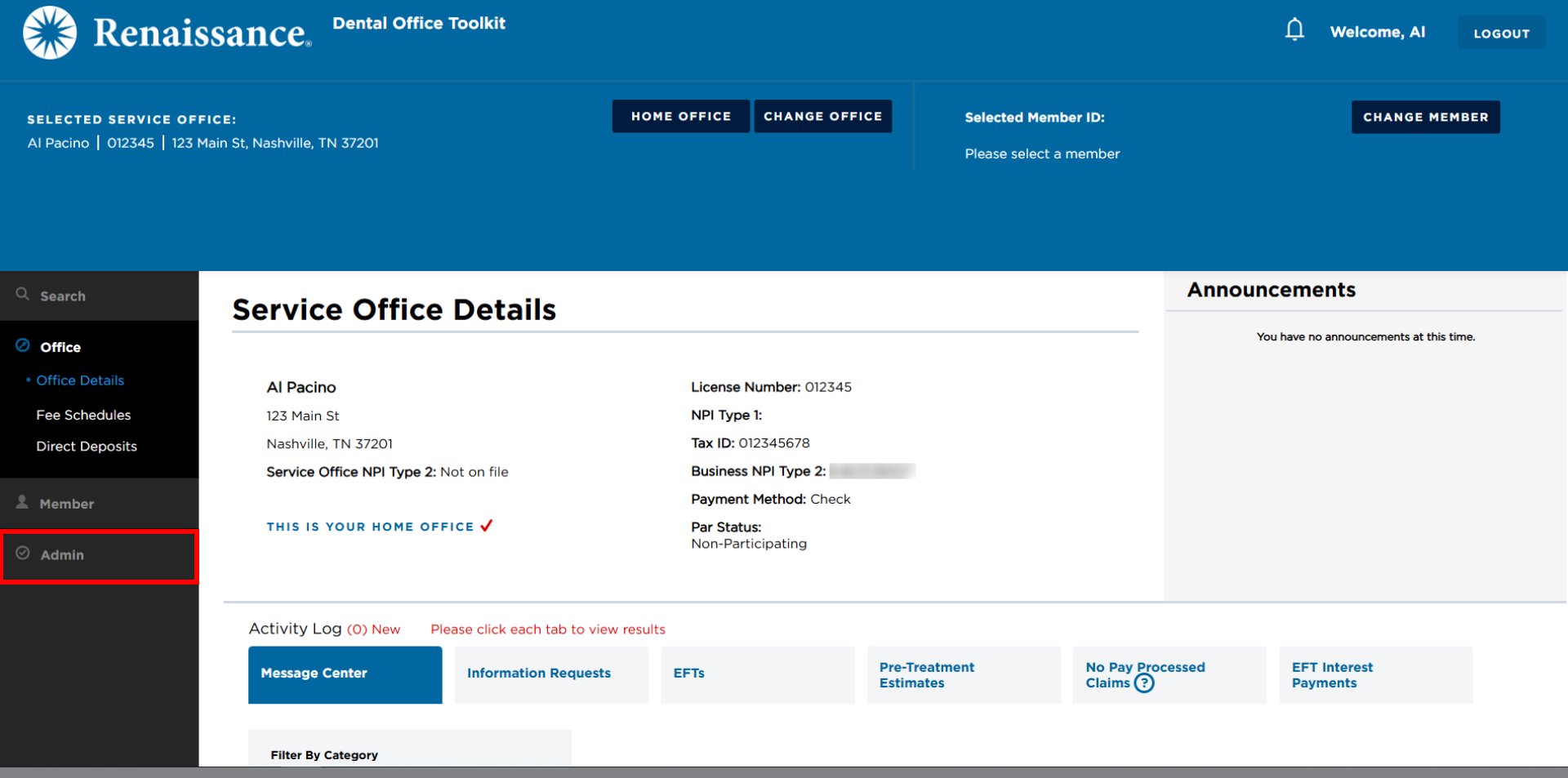
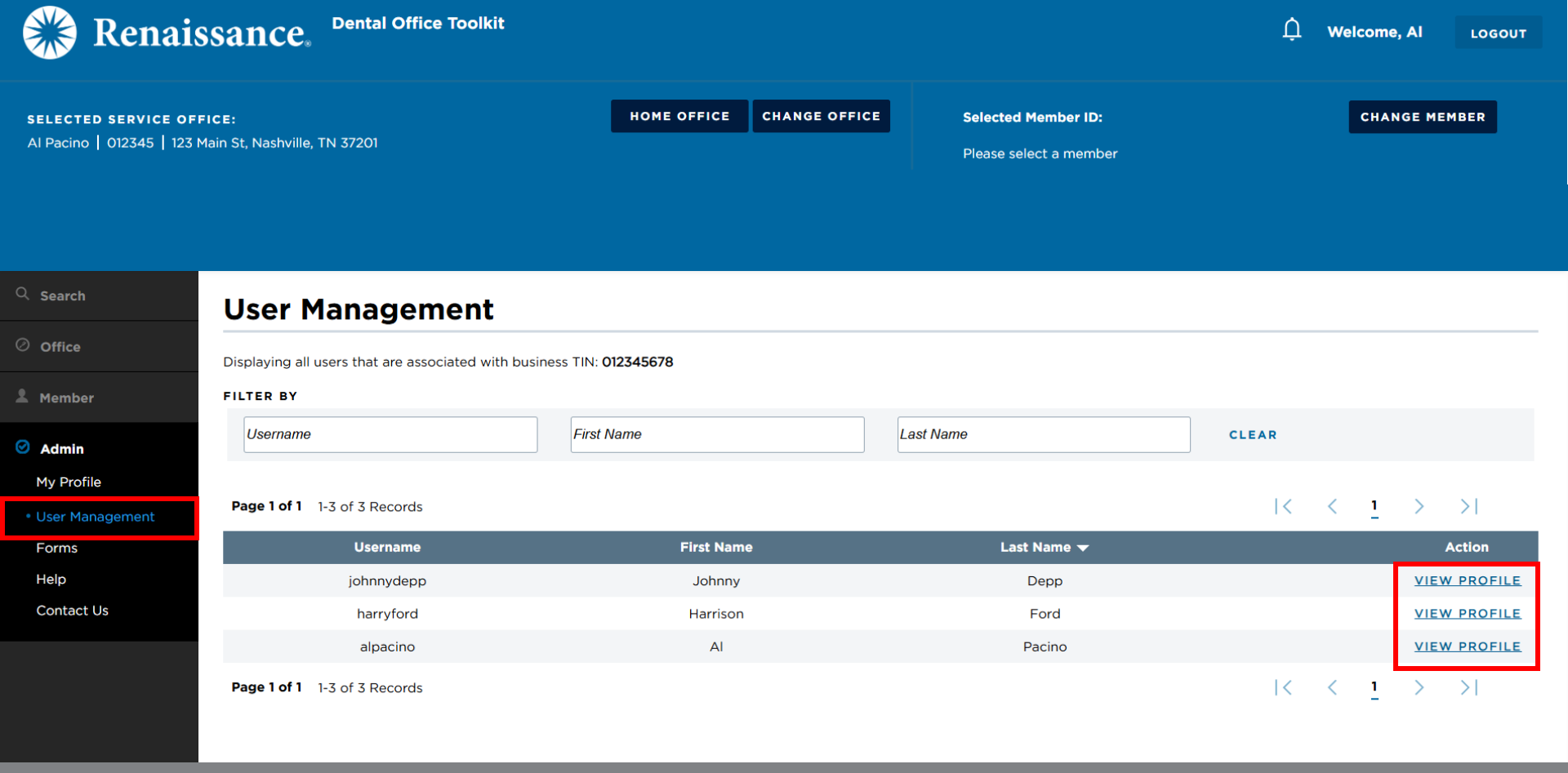
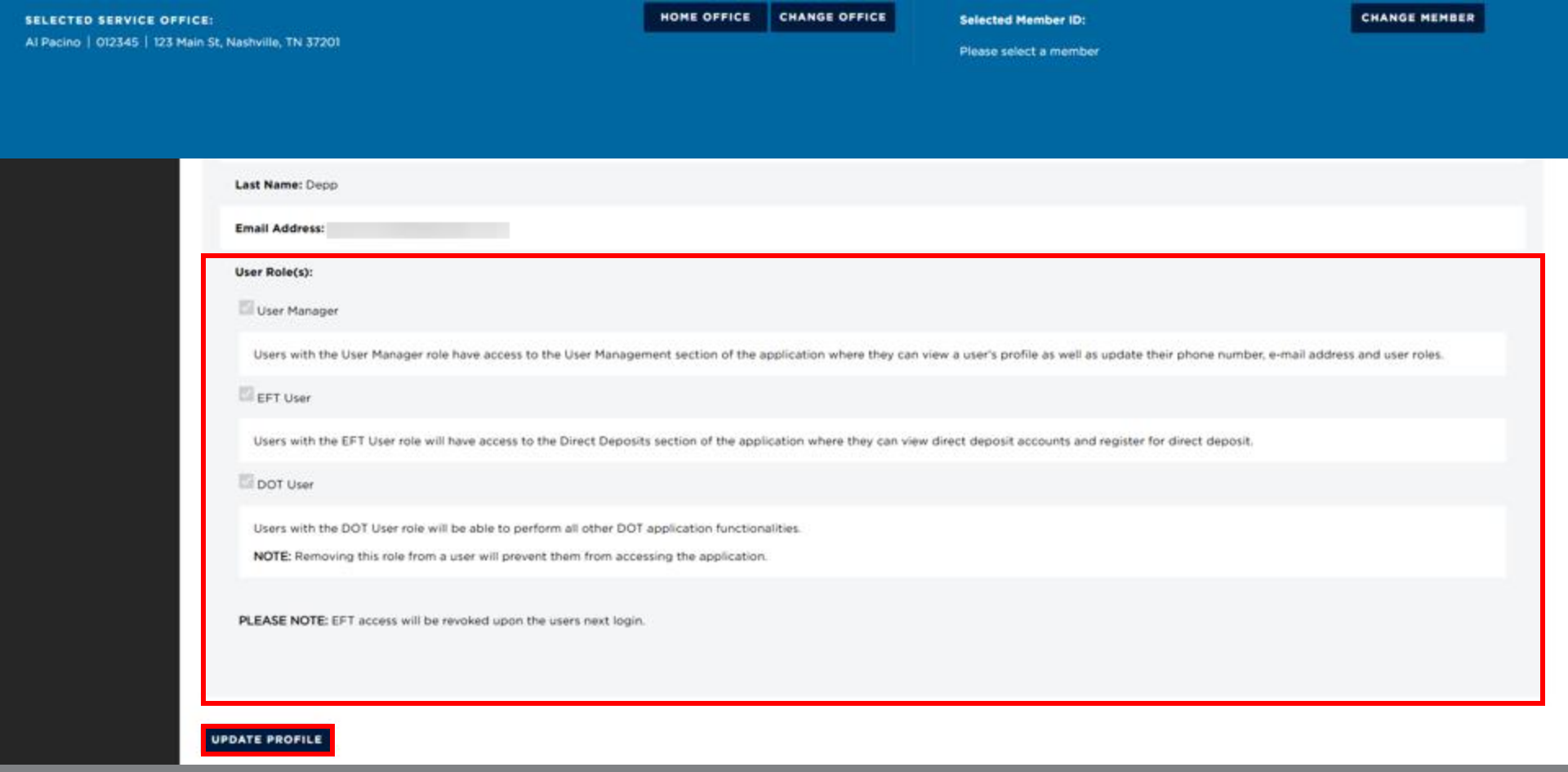
User Management



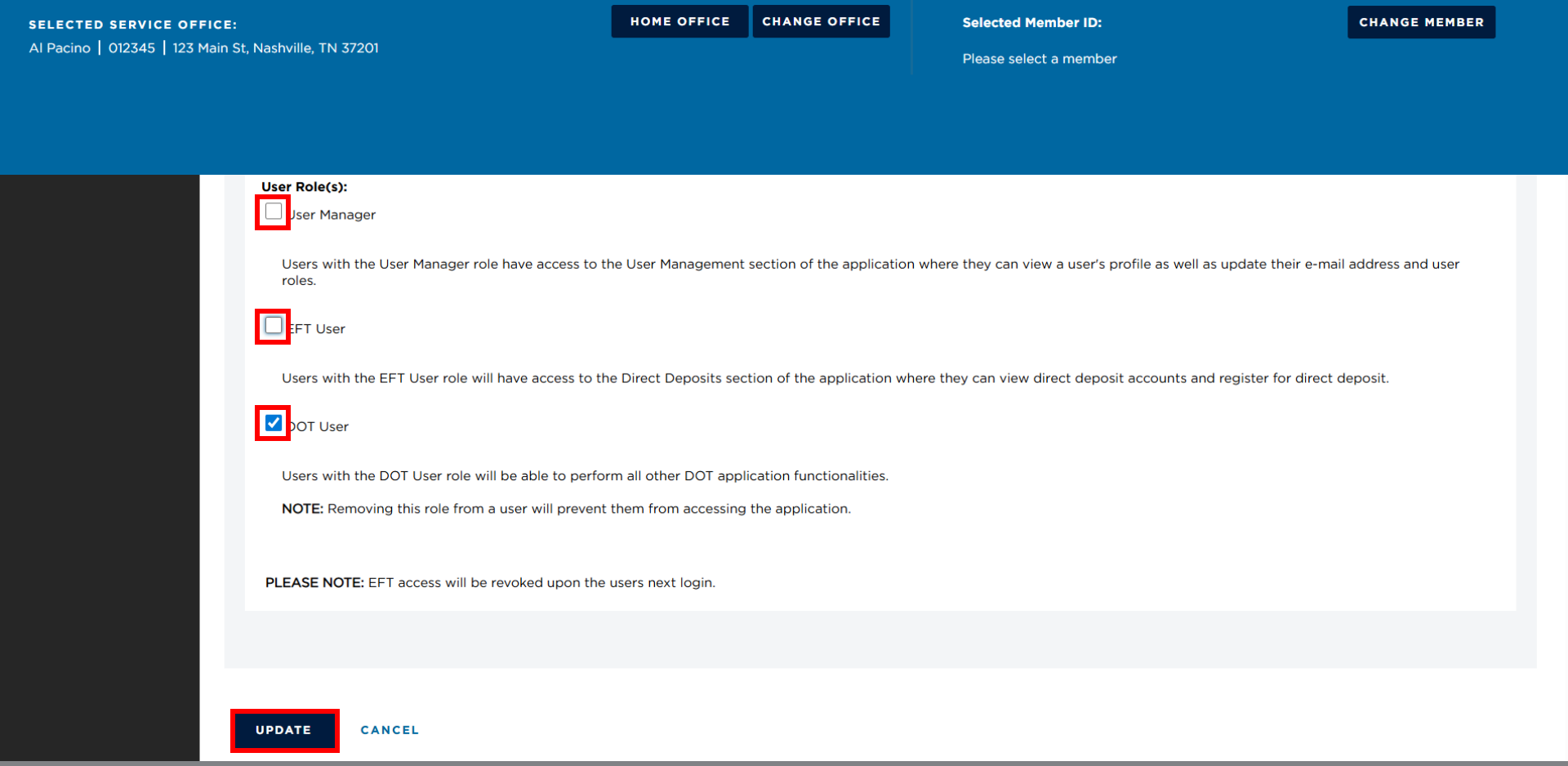
1. After logging into RDOT, navigate to the Admin tab on the left-hand navigation bar



2. Click on “User Management”
3. View the users associated with your office, and click on “View Profile” for any user you’d like to manage permissions for



4. To view and change the user role(s) of any individual user based on your preferences, click on “Update Profile”



5. Select or deselect the user roles based on your preference, then click "Update"

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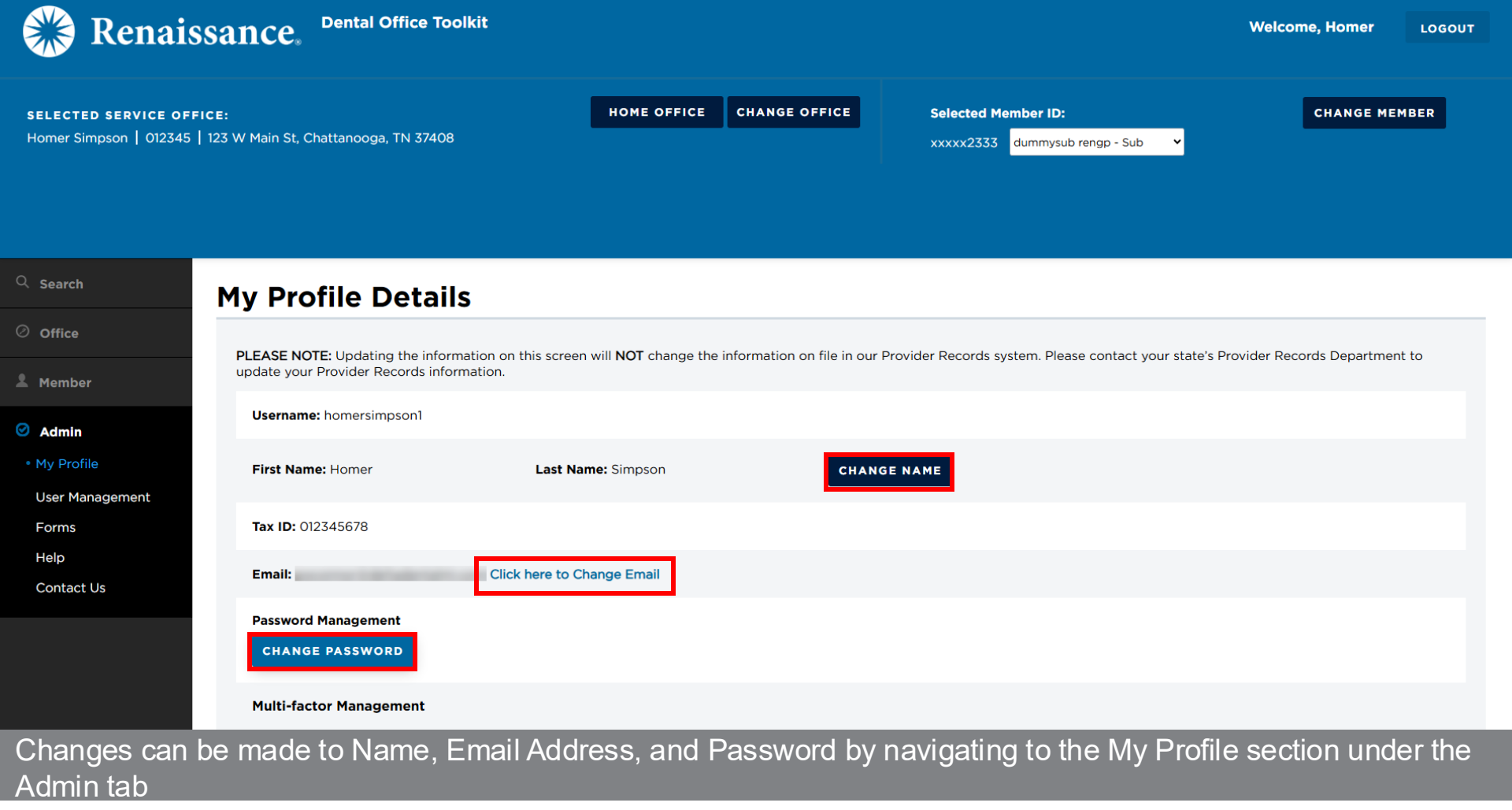
My Profile Details



Changes can be made to Name, Email Address, and Password by navigating to the My Profile section under the Admin tab

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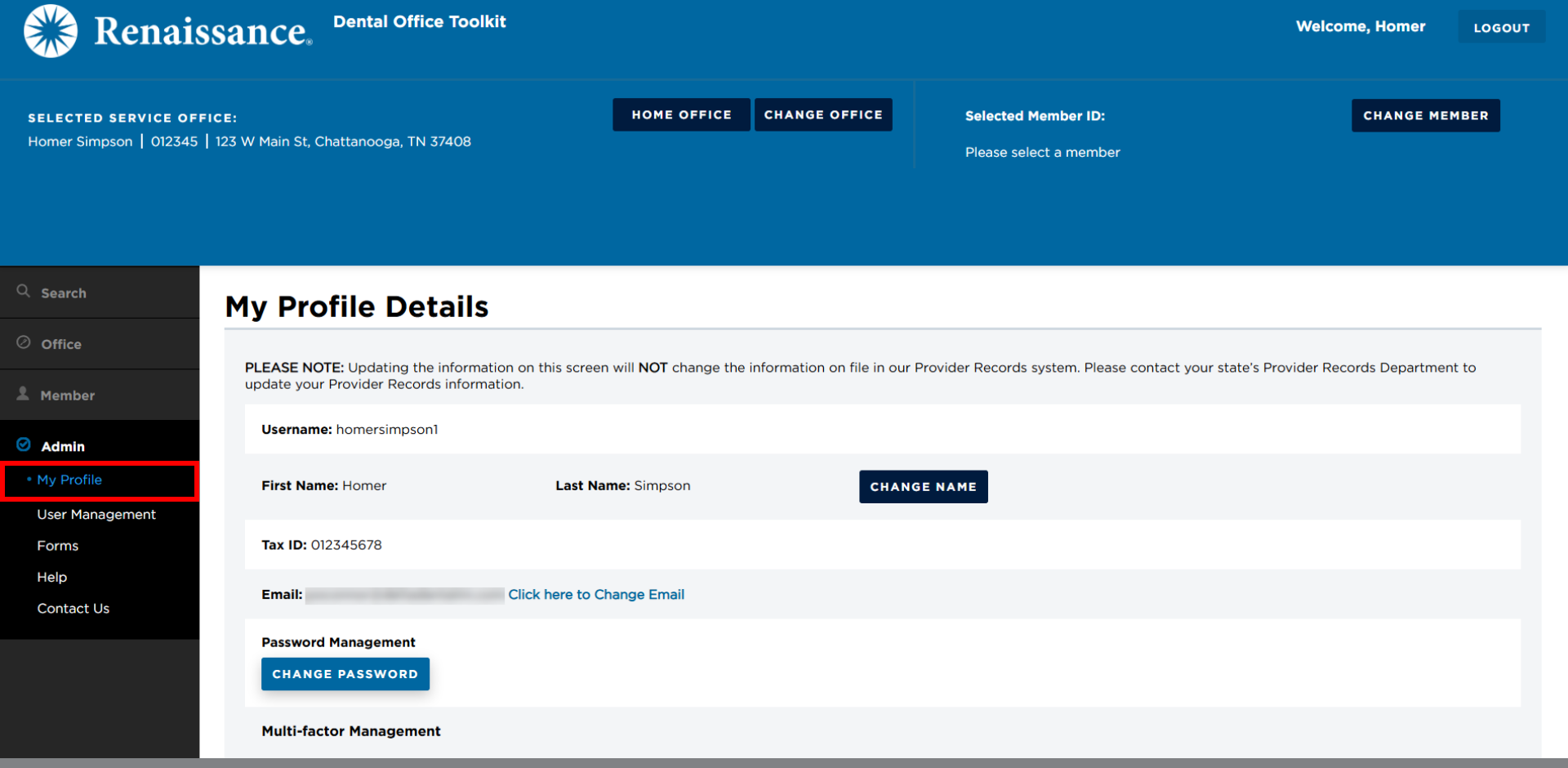
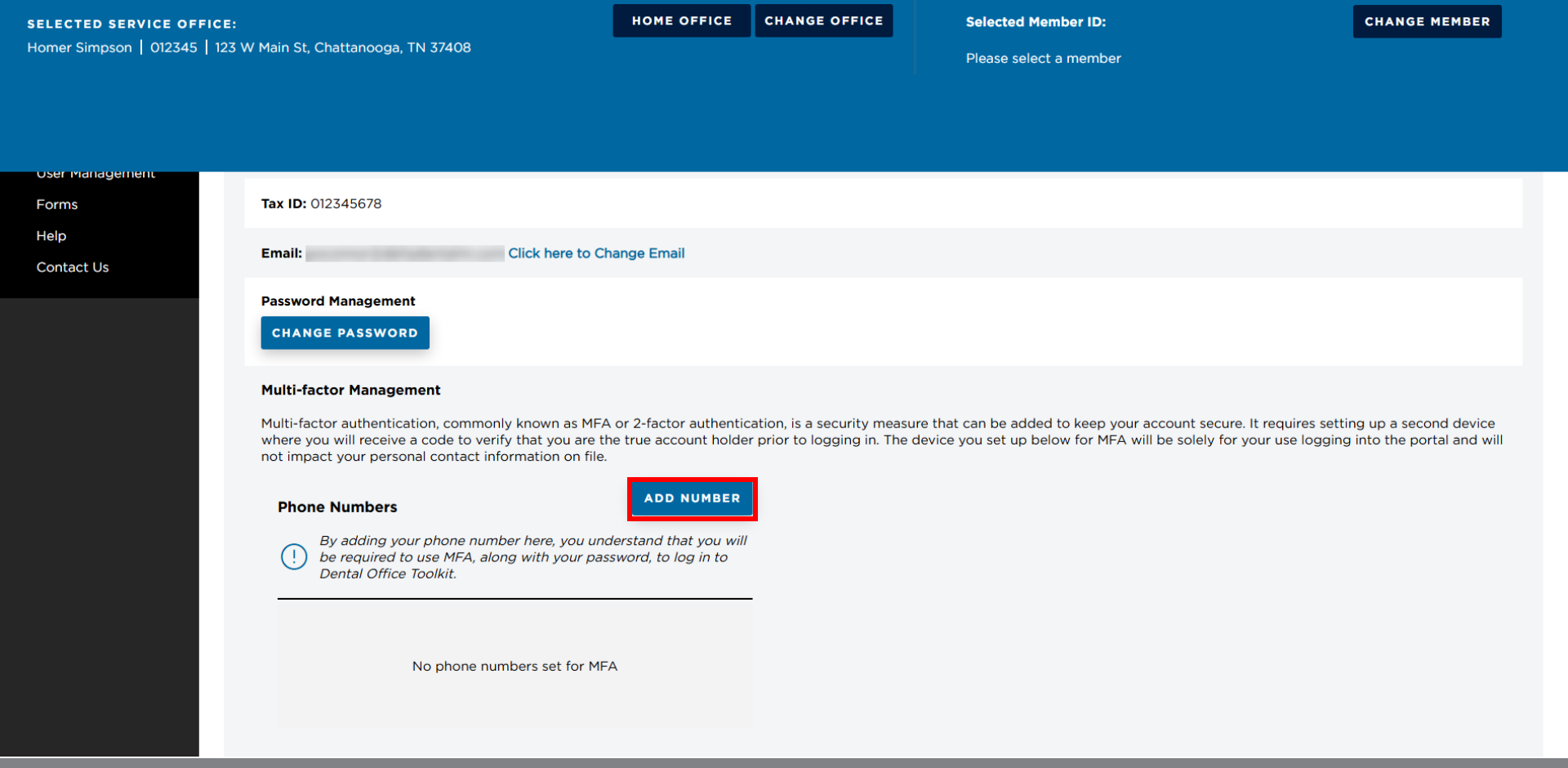
Multi-Factor Authentication

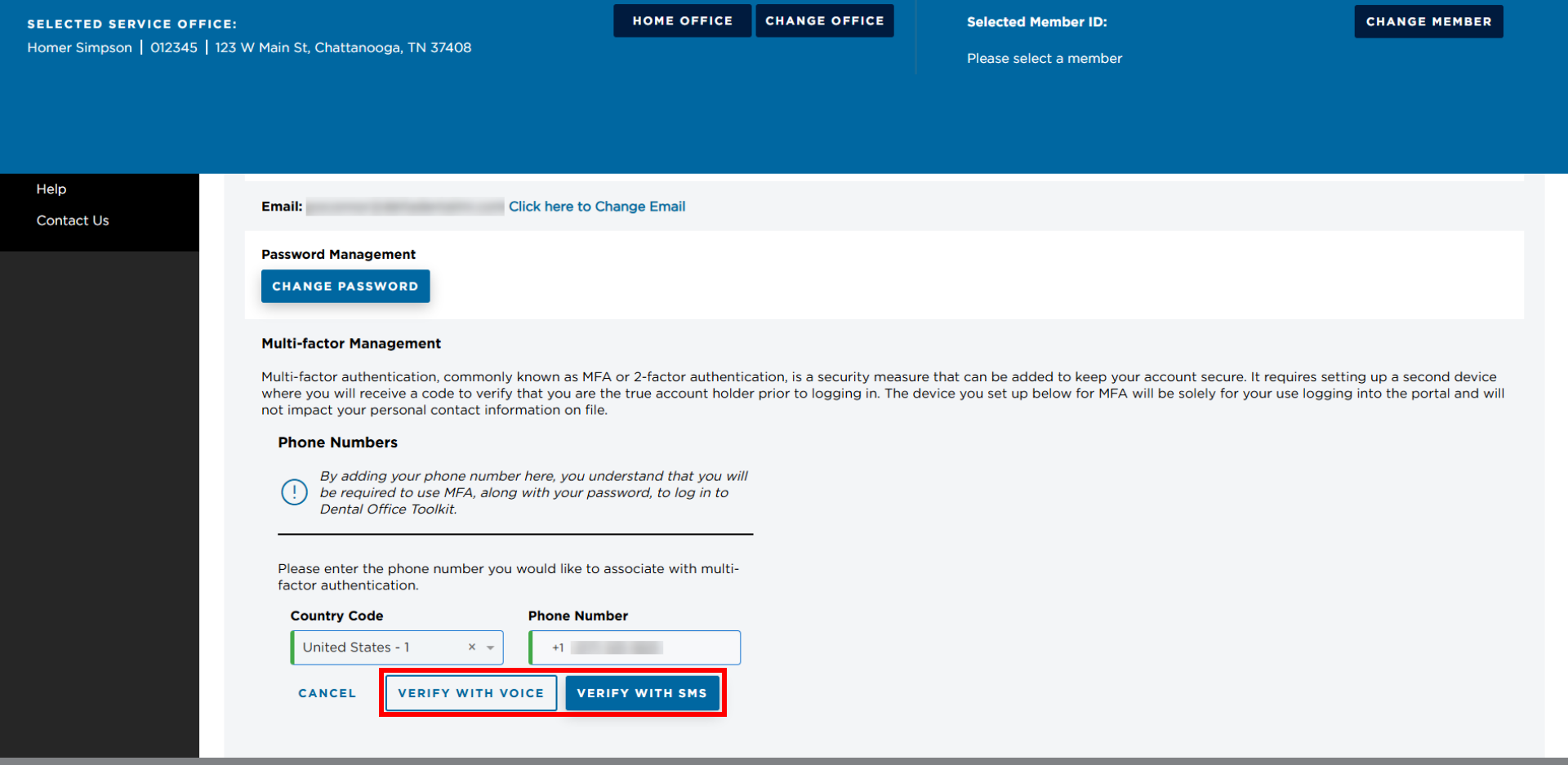
Verify with Email and/or Phone (Voice or SMS)



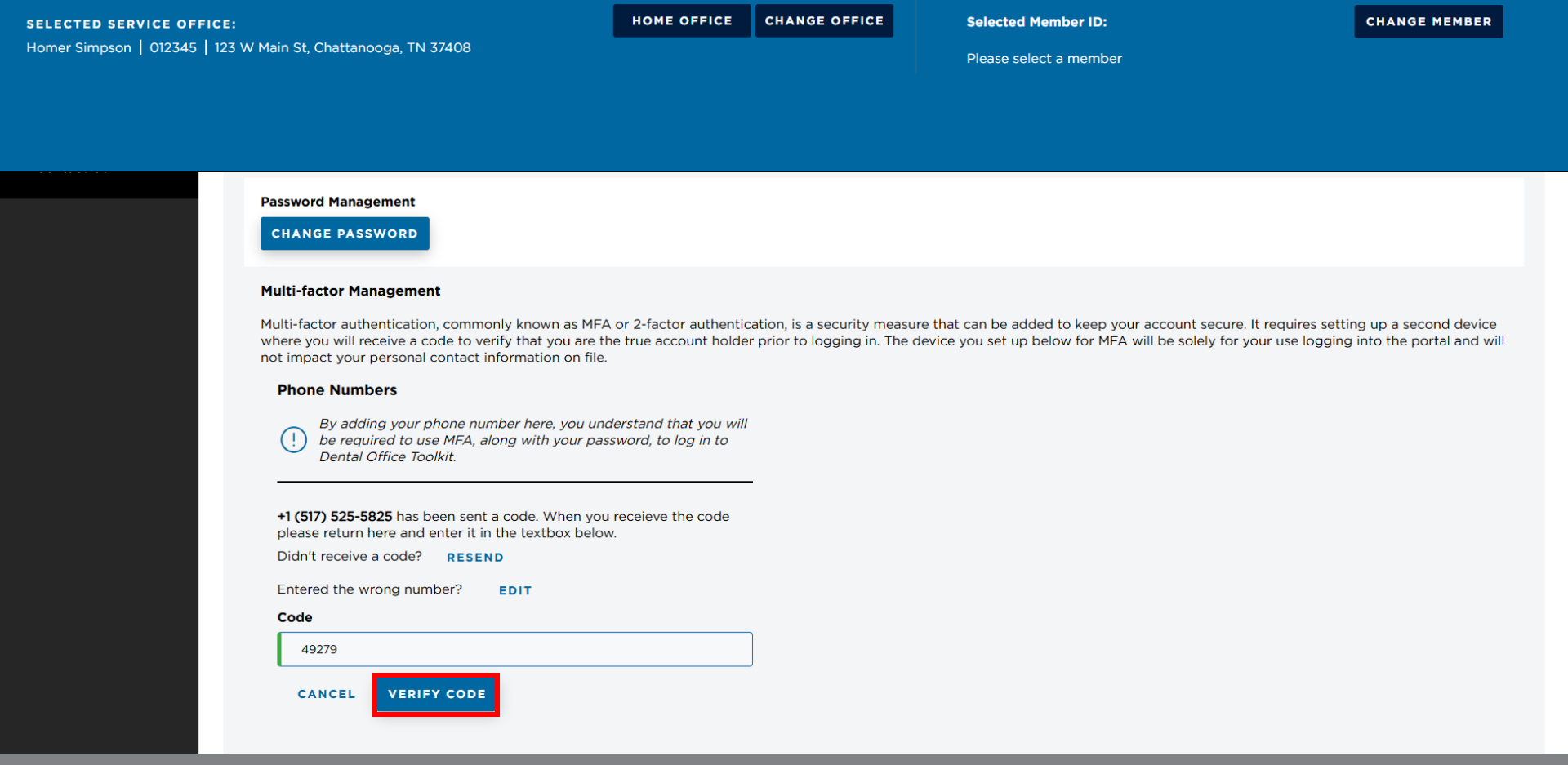
1. Navigate to the Admin tab and click “My Profile”



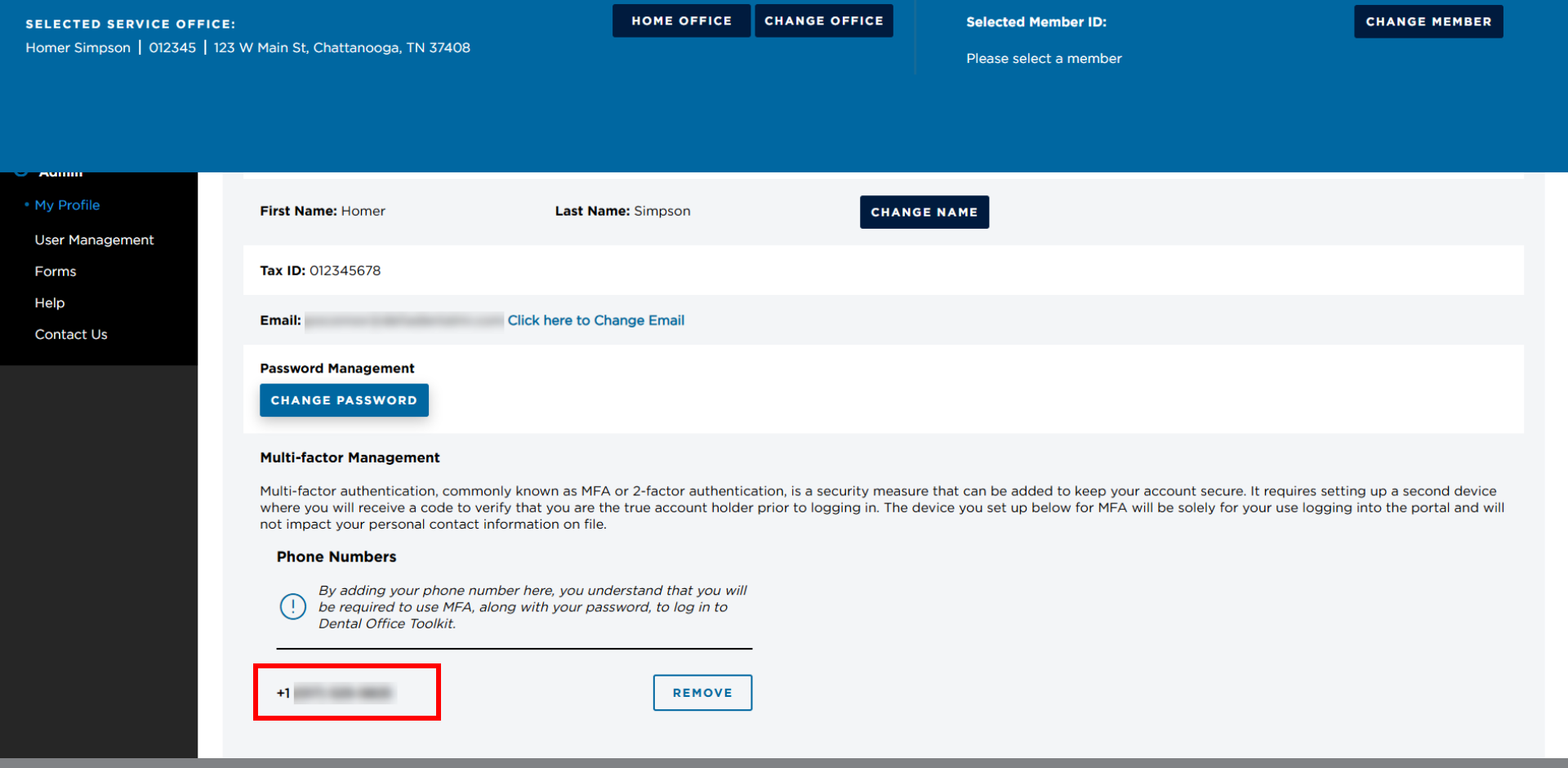
2. Scroll down and click “Add Number” in the Multi-factor Management section



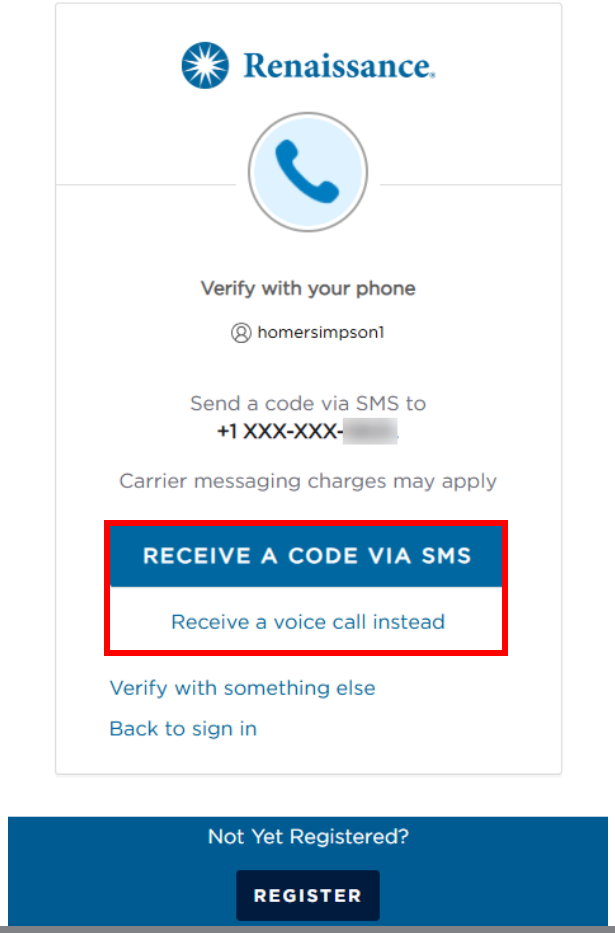
3. Enter the phone number you would like to use and click “Verify with Voice” or “Verify with SMS”



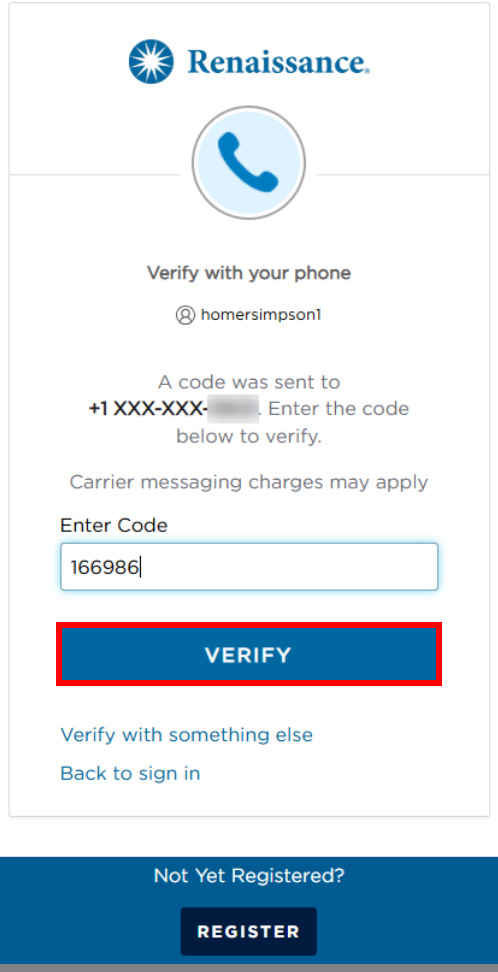
4. Enter the code you received via phone call or text message and click “Verify Code”



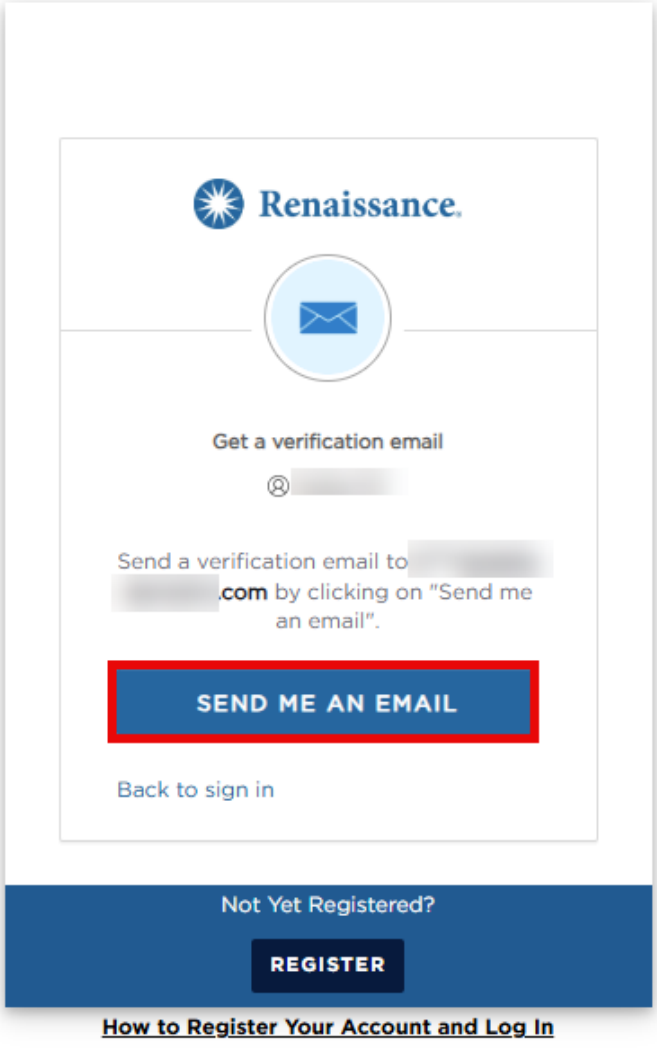
5. After verifying the code, the phone number you chose should display here

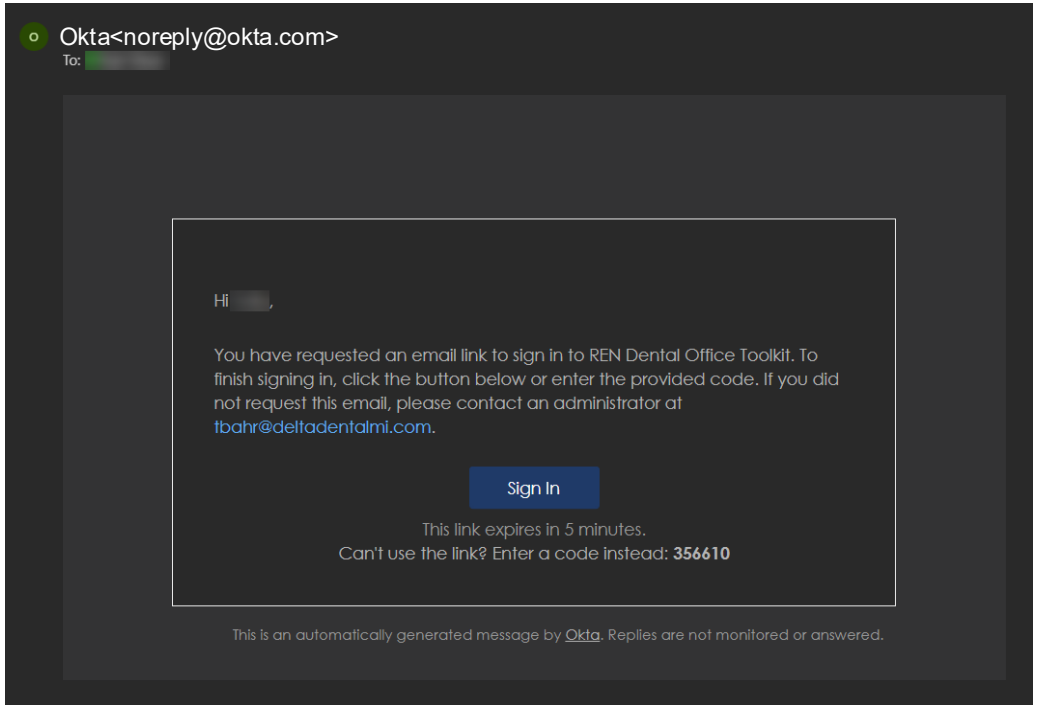


6. When logging in the next time, after entering username and password, users can request the one time passcode to be sent via SMS or voice call

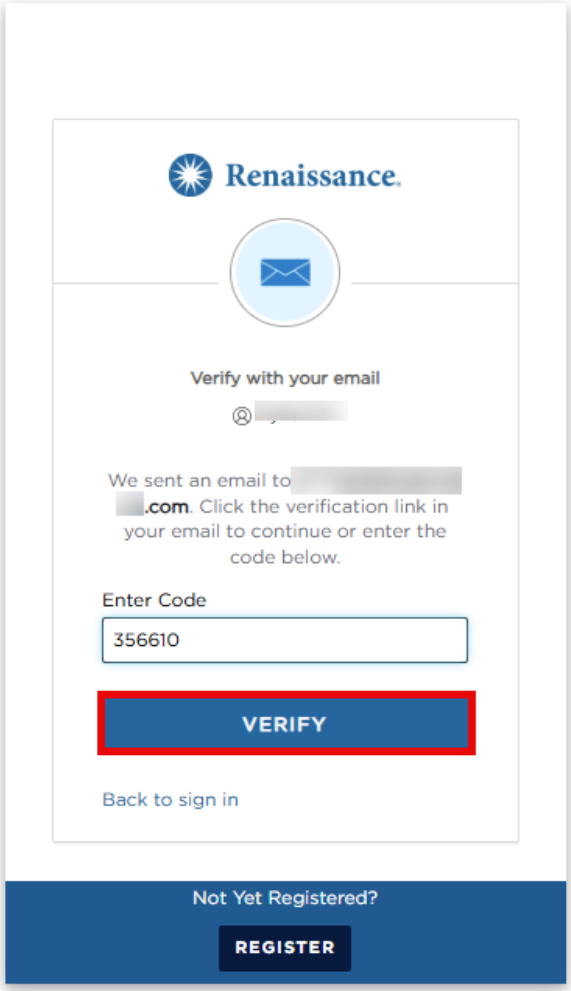


7. Enter the code that was received via SMS or voice call into the Enter Code field and click “Verify”





8. When verifying with email, select "Send Me An Email"



9. Enter the code you received via email message and click “Verify”

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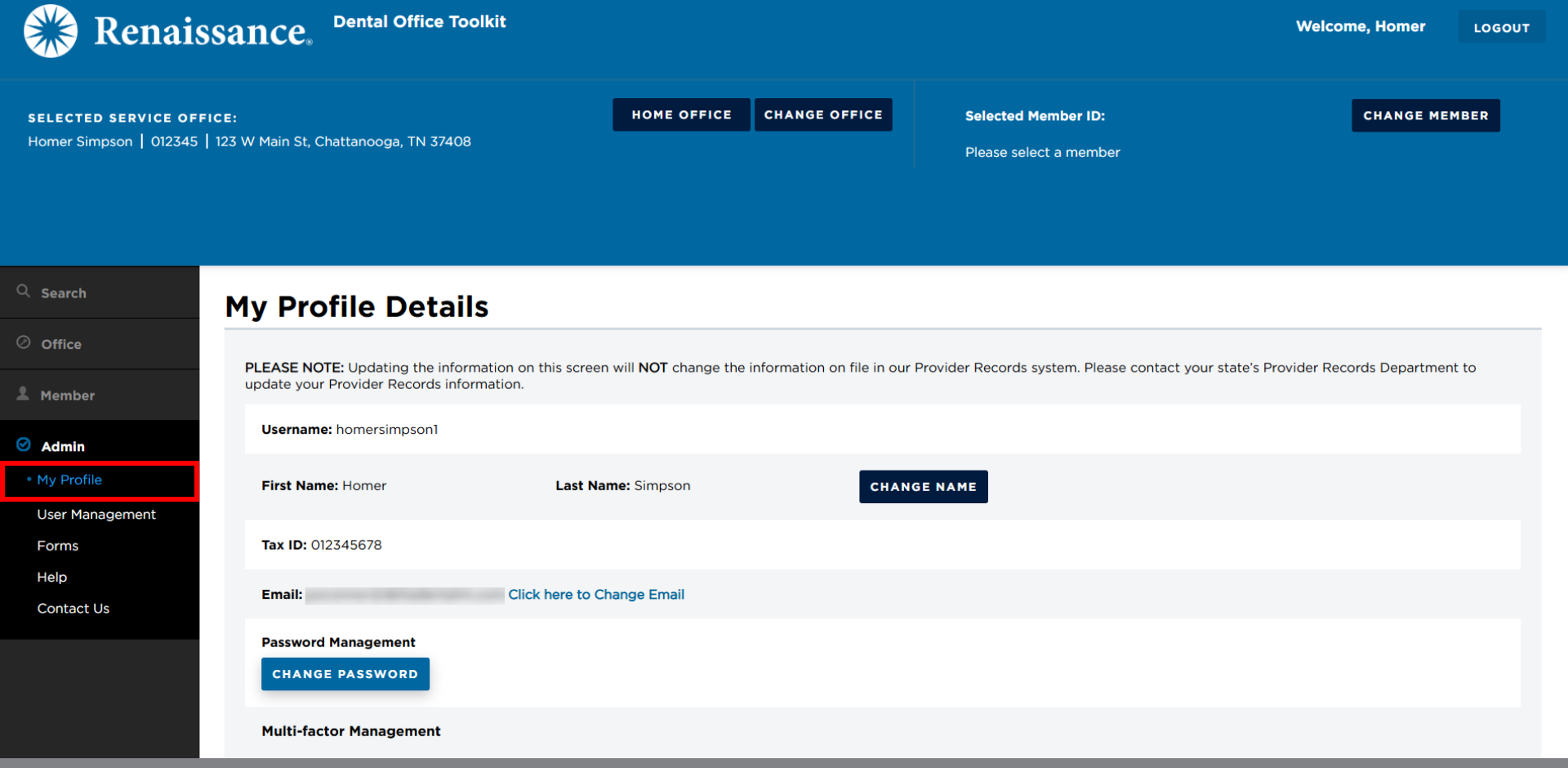
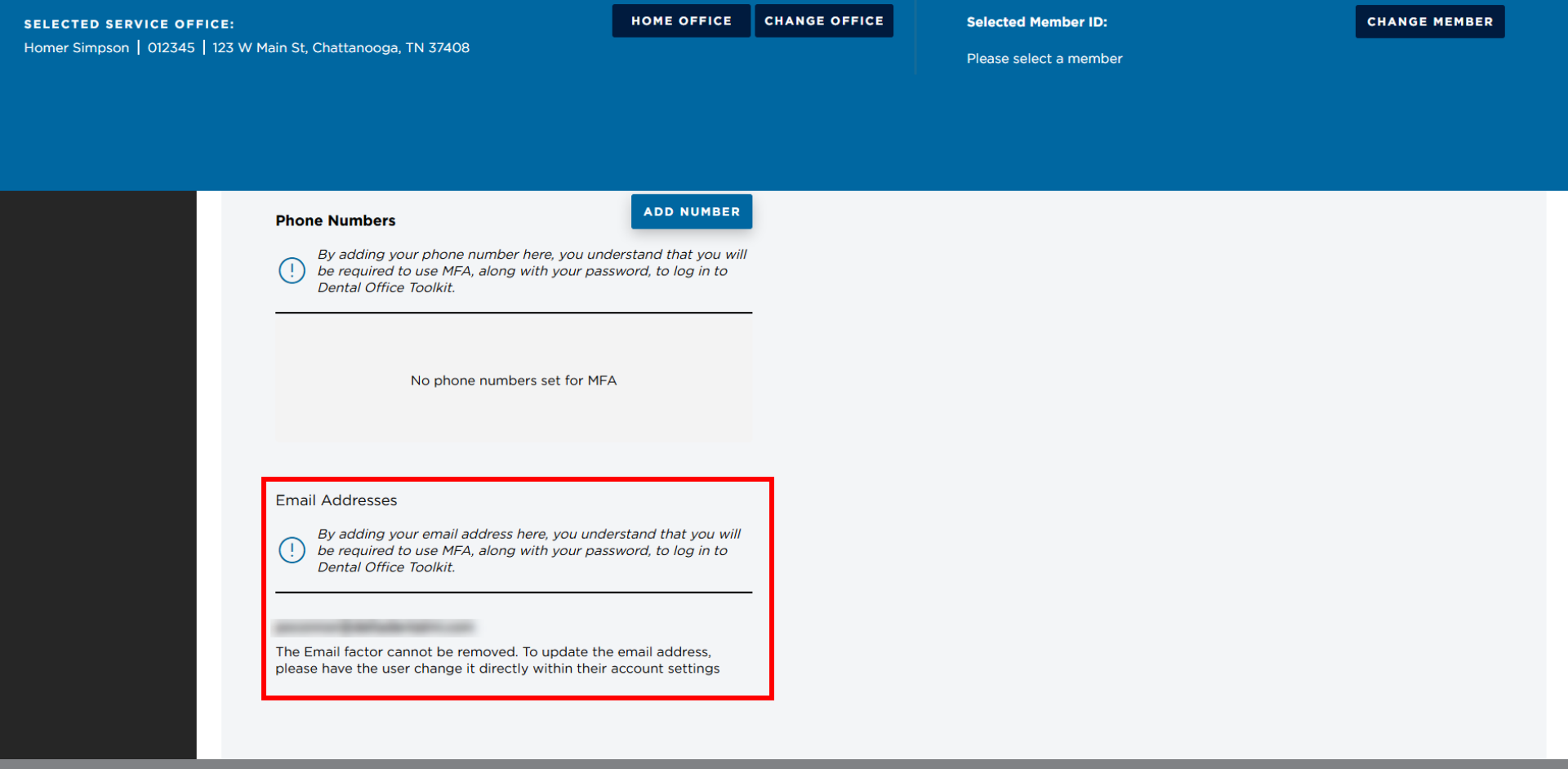
Multi-Factor Authentication

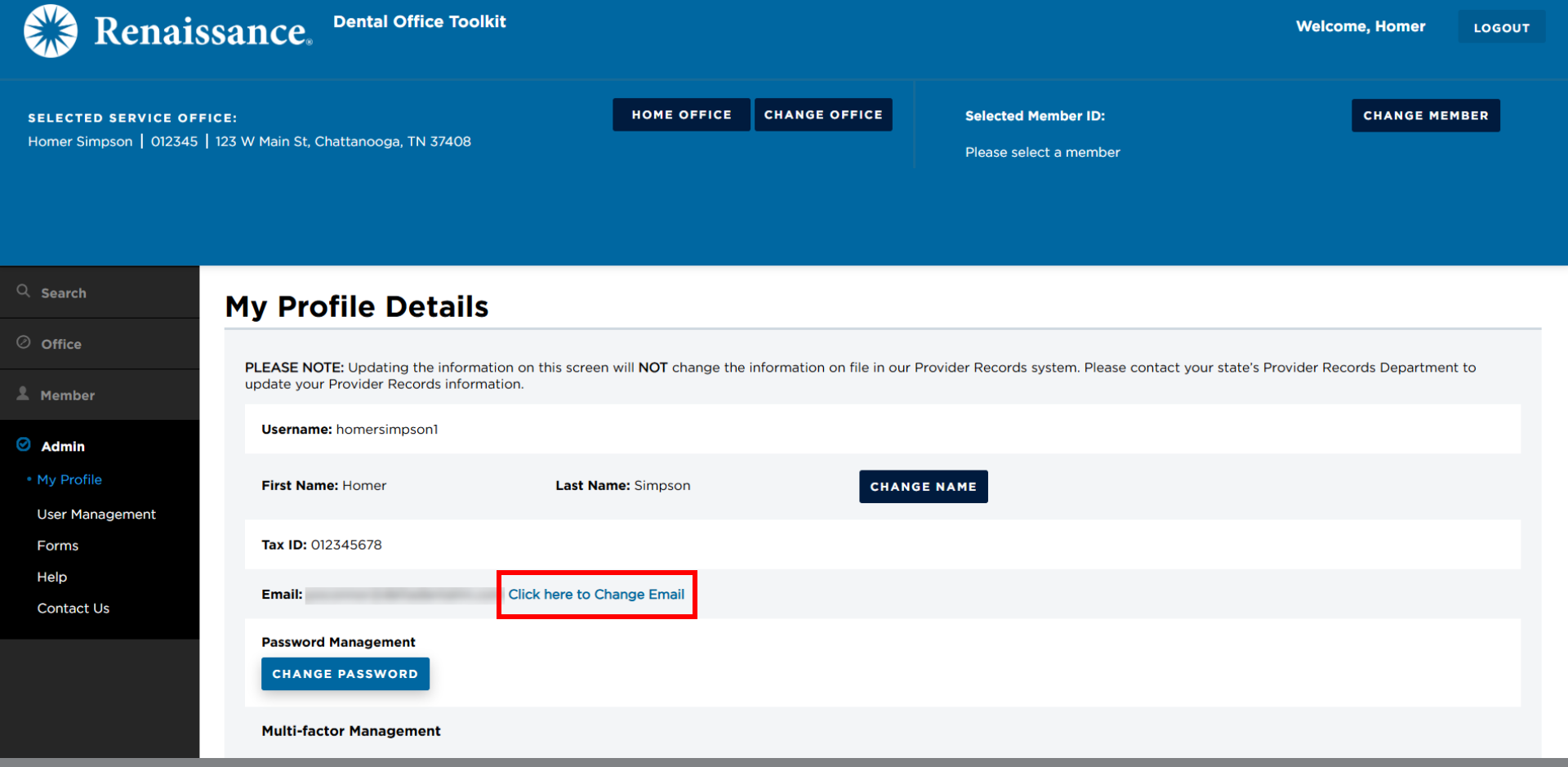
Verify With Email



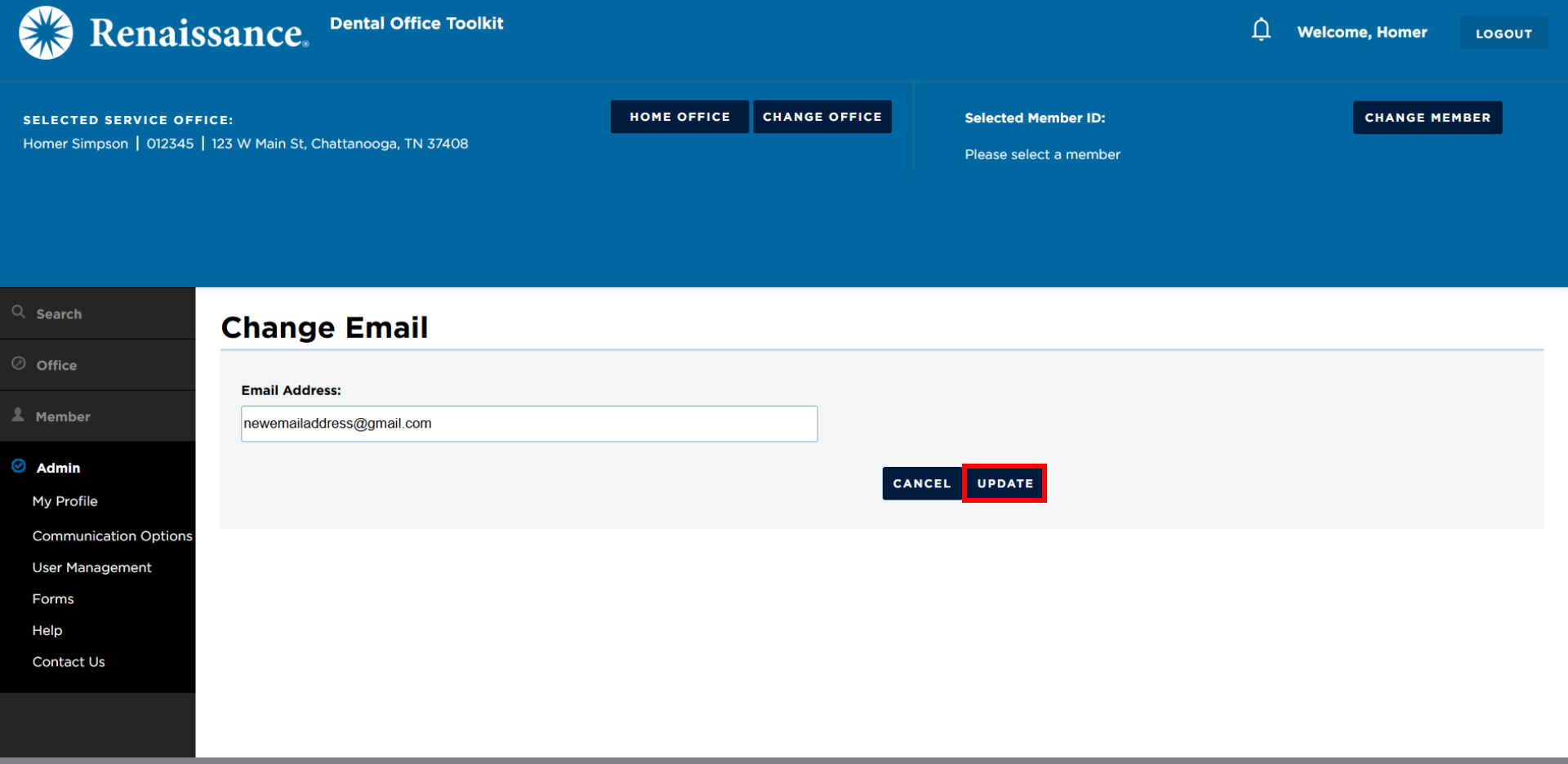
1. Navigate to the Admin tab and click “My Profile”



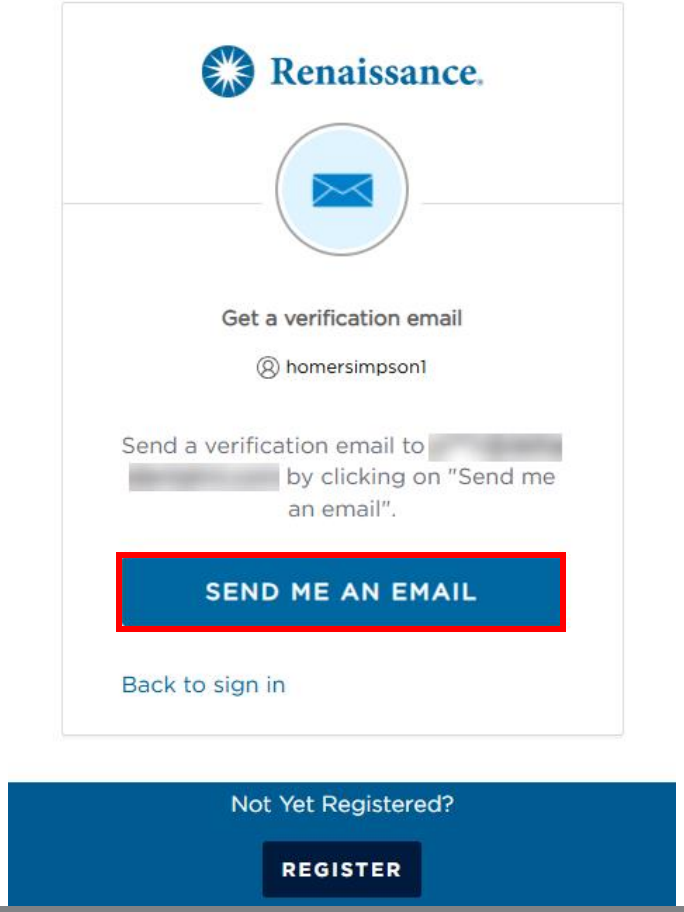
2. Scroll down to the Email Addresses section of the Multi-factor Management section. Note that the email listed is the one that is on file for the service office.



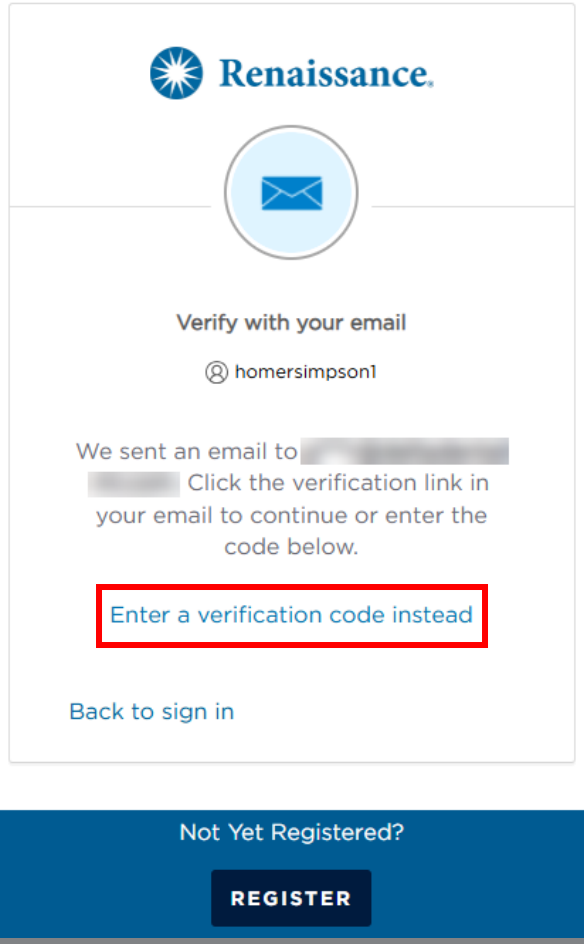
3. To change the email address, select “Click here to Change Email” near the top of the My Profile Details section



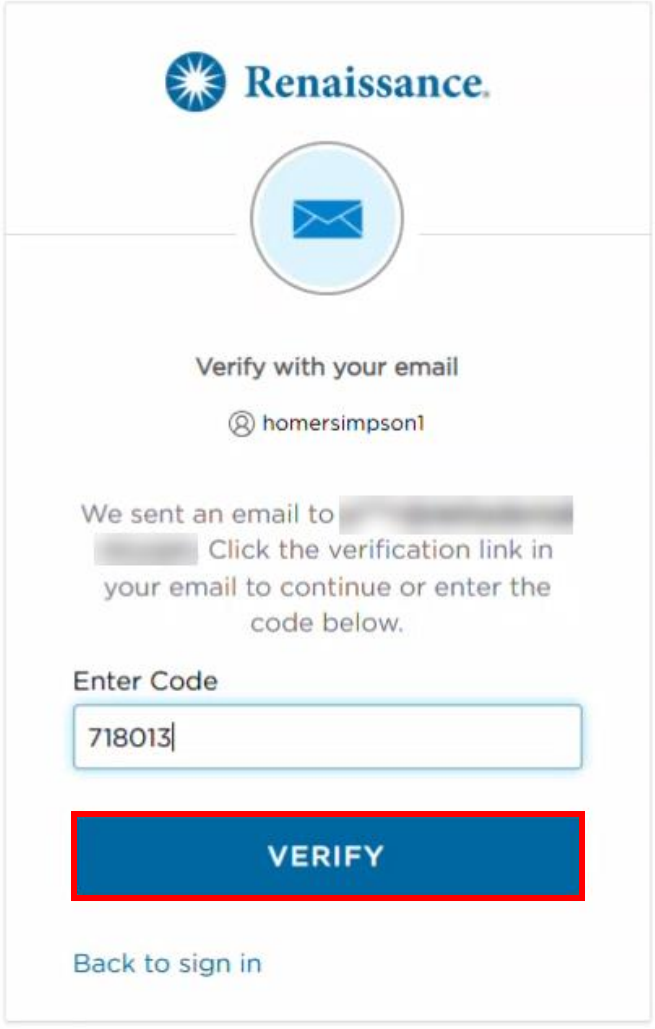
4. Enter the email address you would like to use and click “Update”



5. When logging in the next time, after entering username and password, users will request the one time passcode to be sent via email



6. Click “Enter a verification code instead”



7. Enter the code that was received via email into the Enter Code field and click “Verify”

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Allow Pop-Ups and Cookies in Google Chrome

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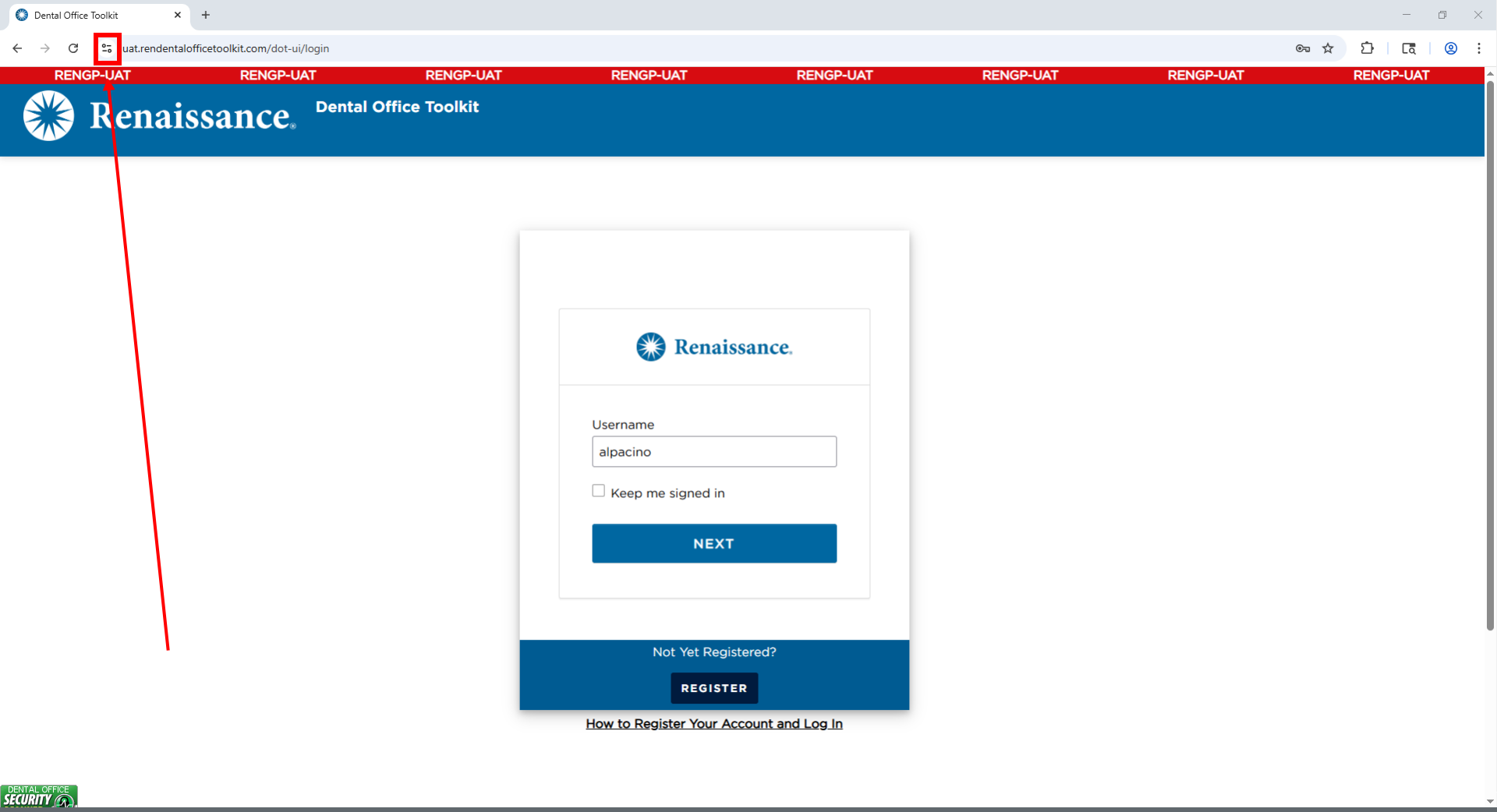
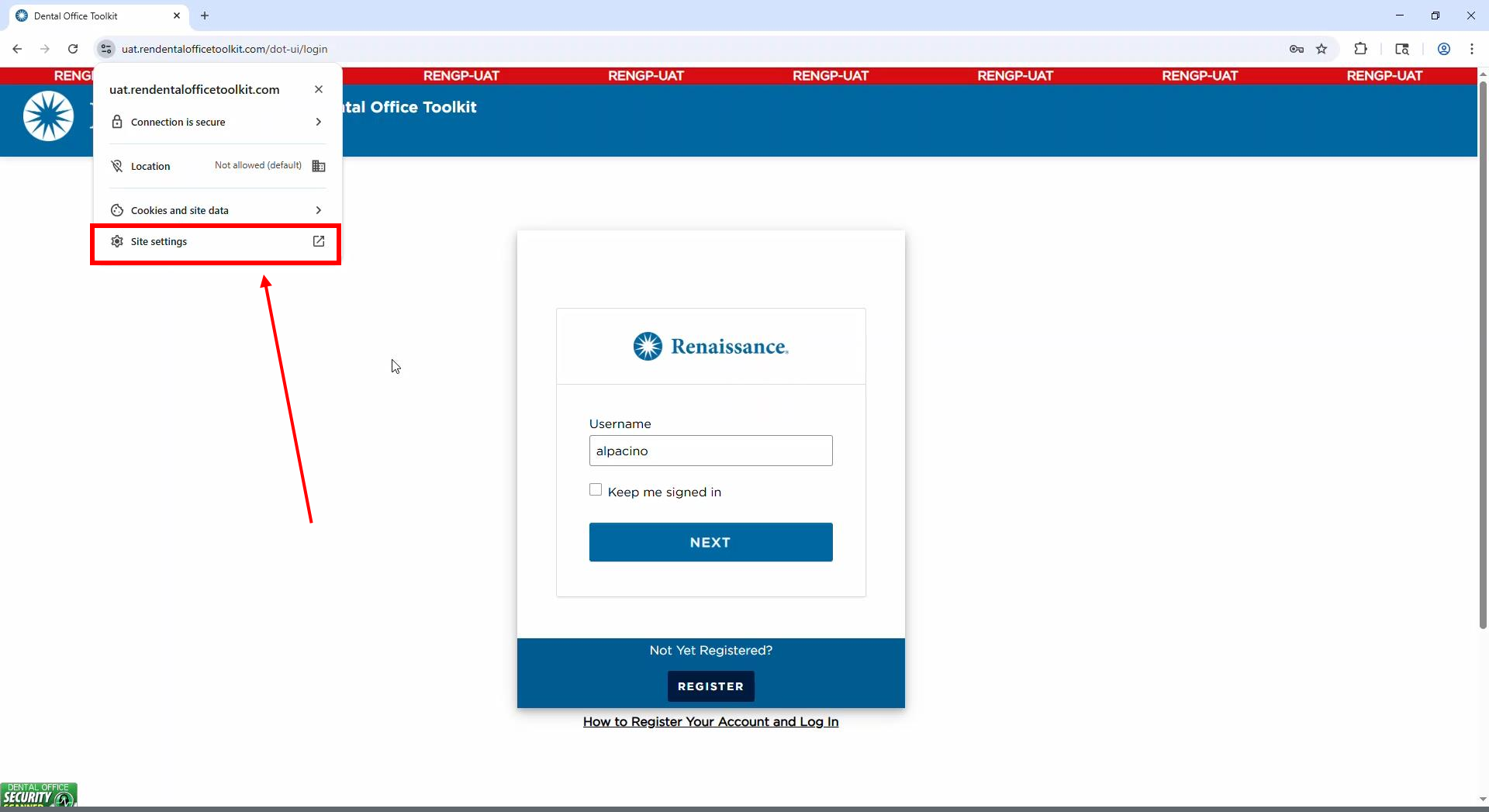
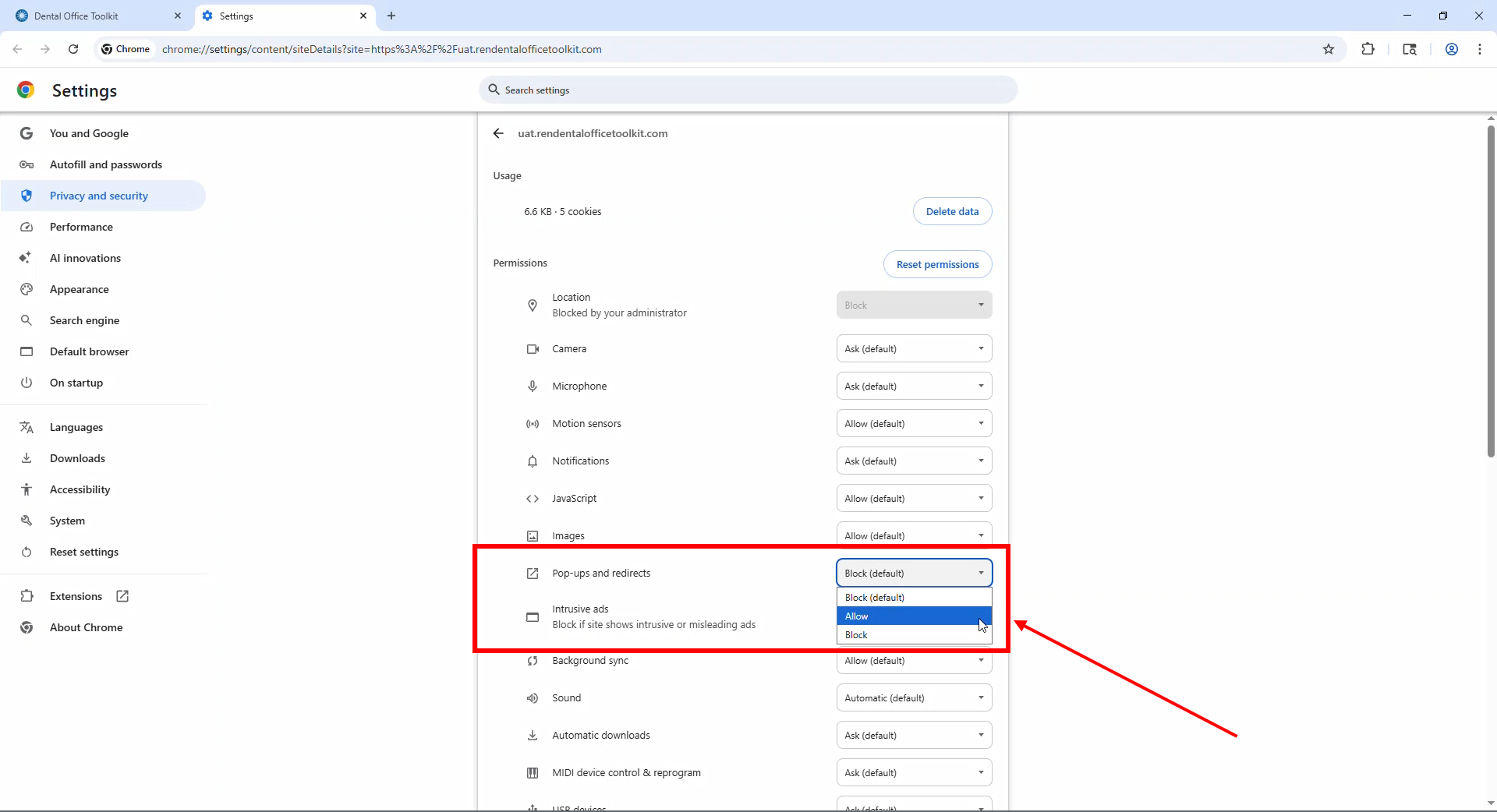
Allow Pop-Ups in Google Chrome



1. Click on the icon in the address bar



2. Click on "Site settings"



3. On the Privacy and security tab, scroll down to "Pop-ups and redirects" and change the setting to ALLOW
4. Refresh the RDOT website

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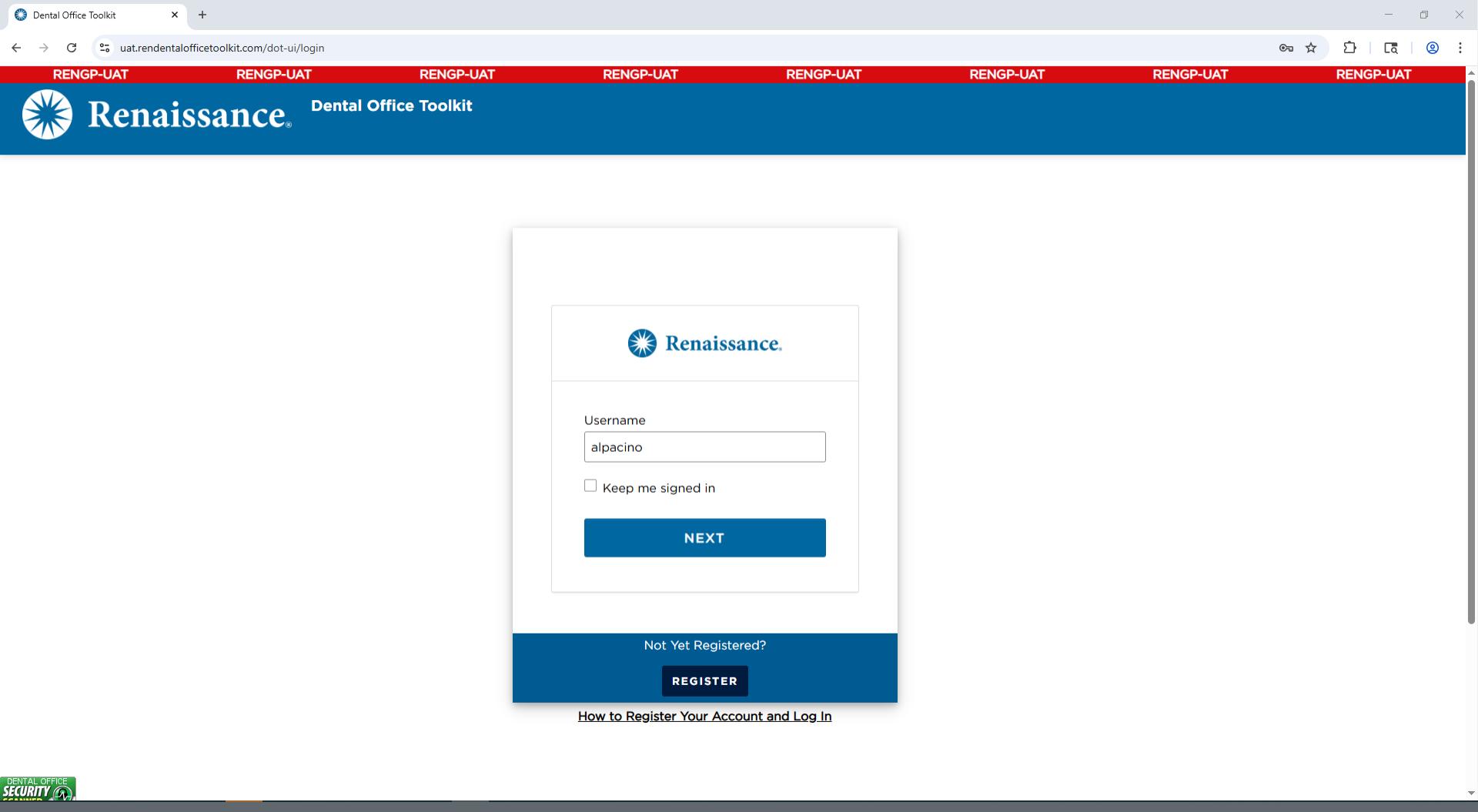
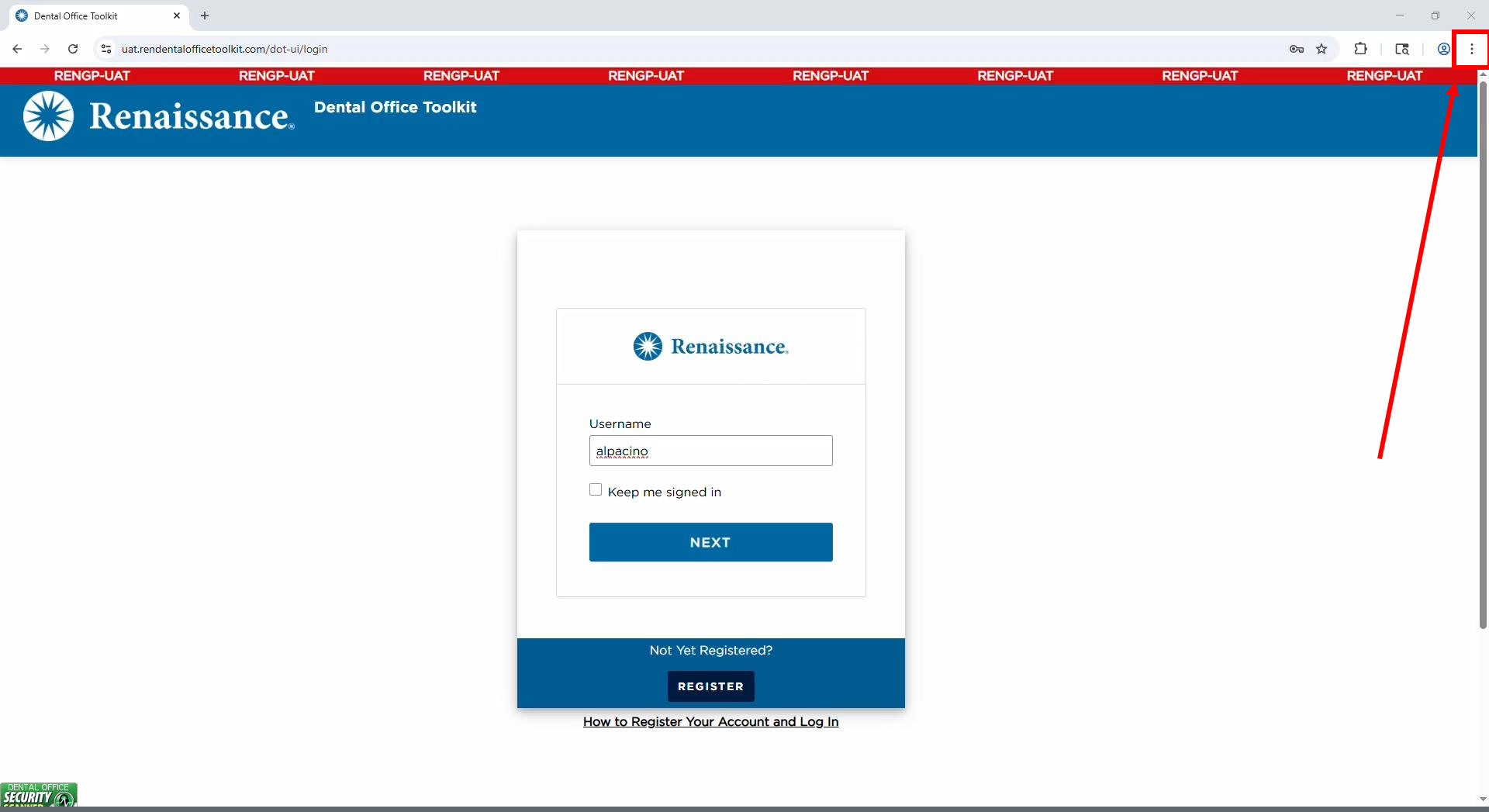
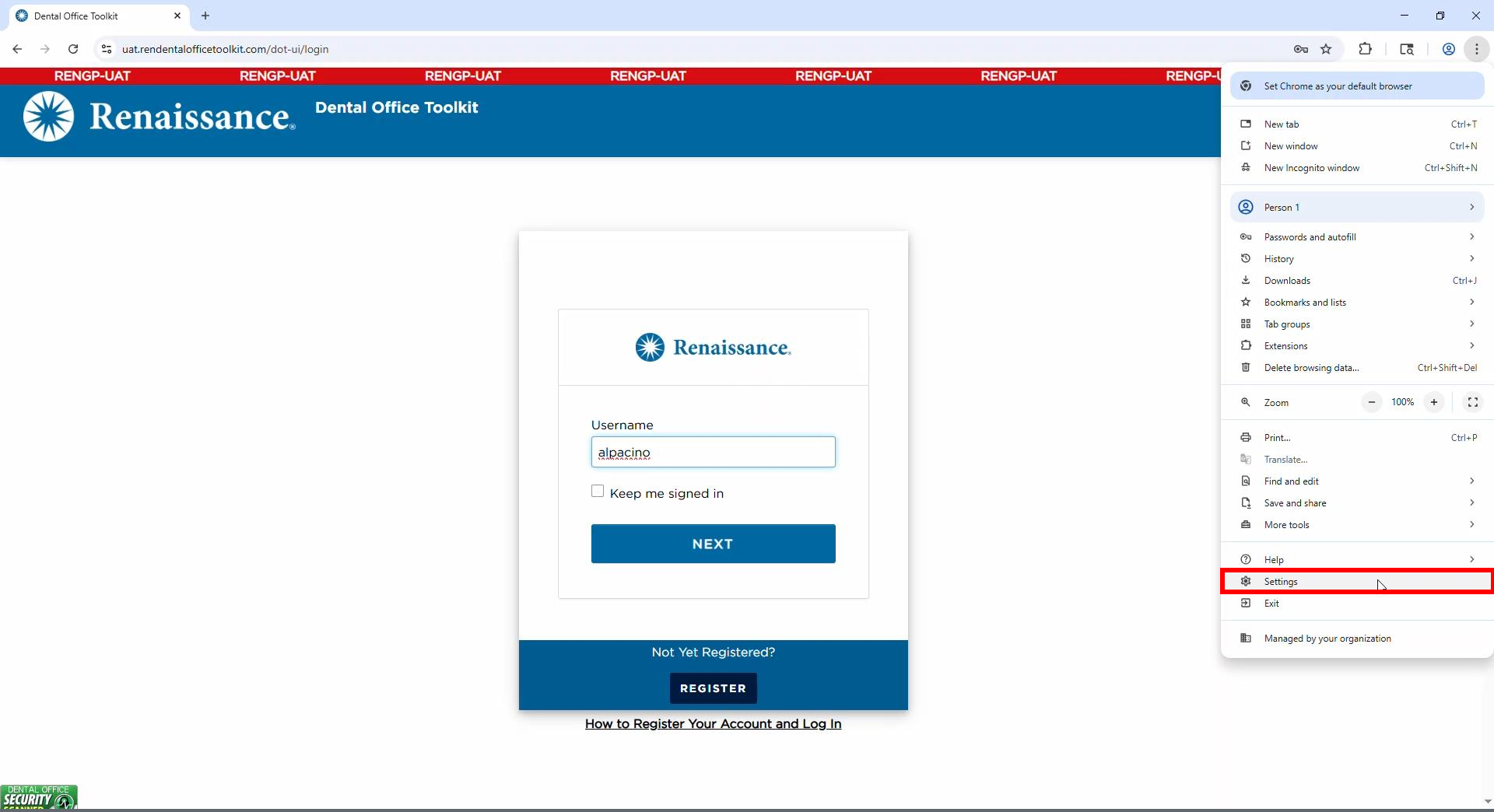
Allow Cookies in Google Chrome



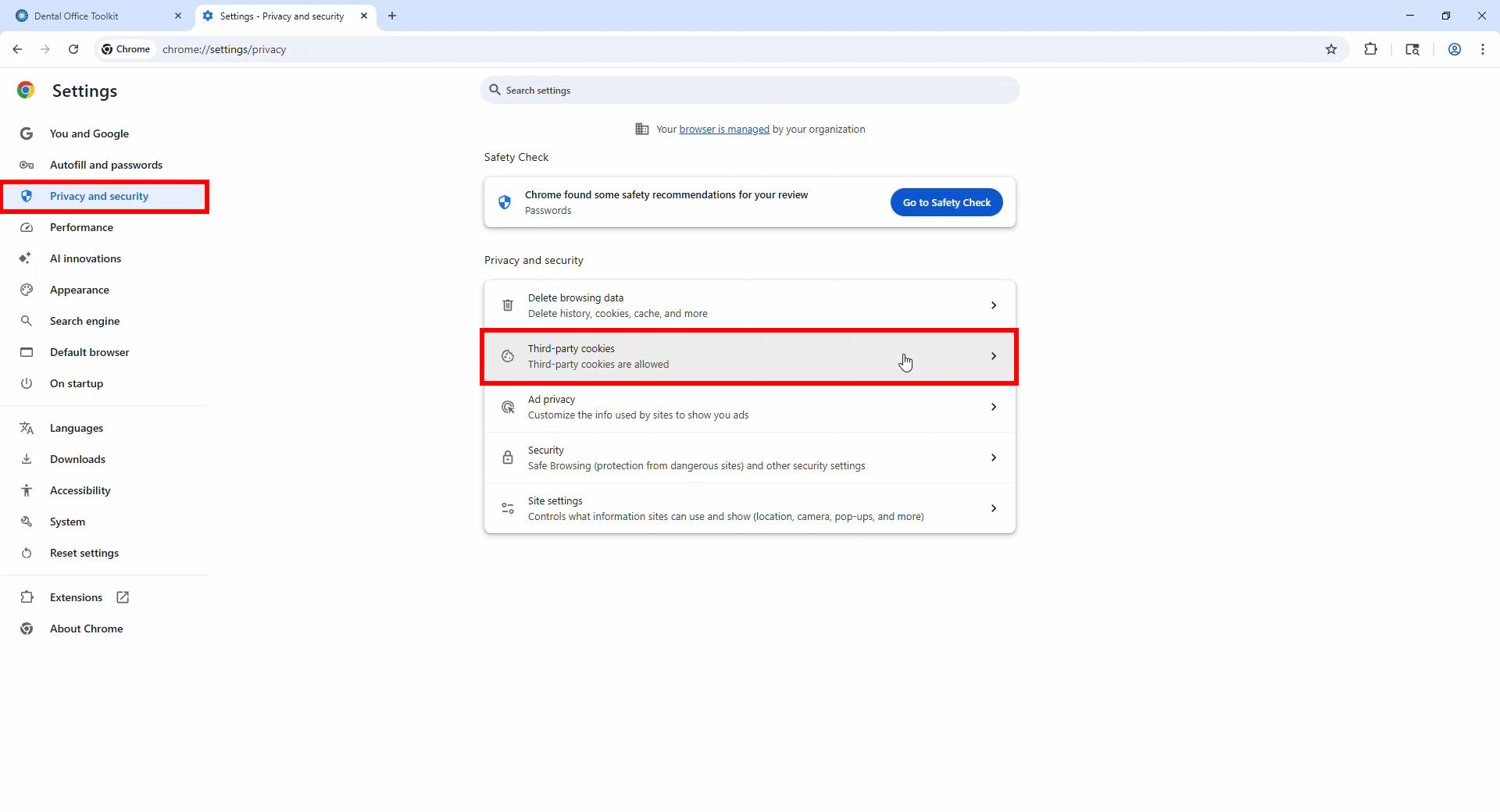
Note: This guide is for any users who are getting redirected back to the login page each time they attempt to log in



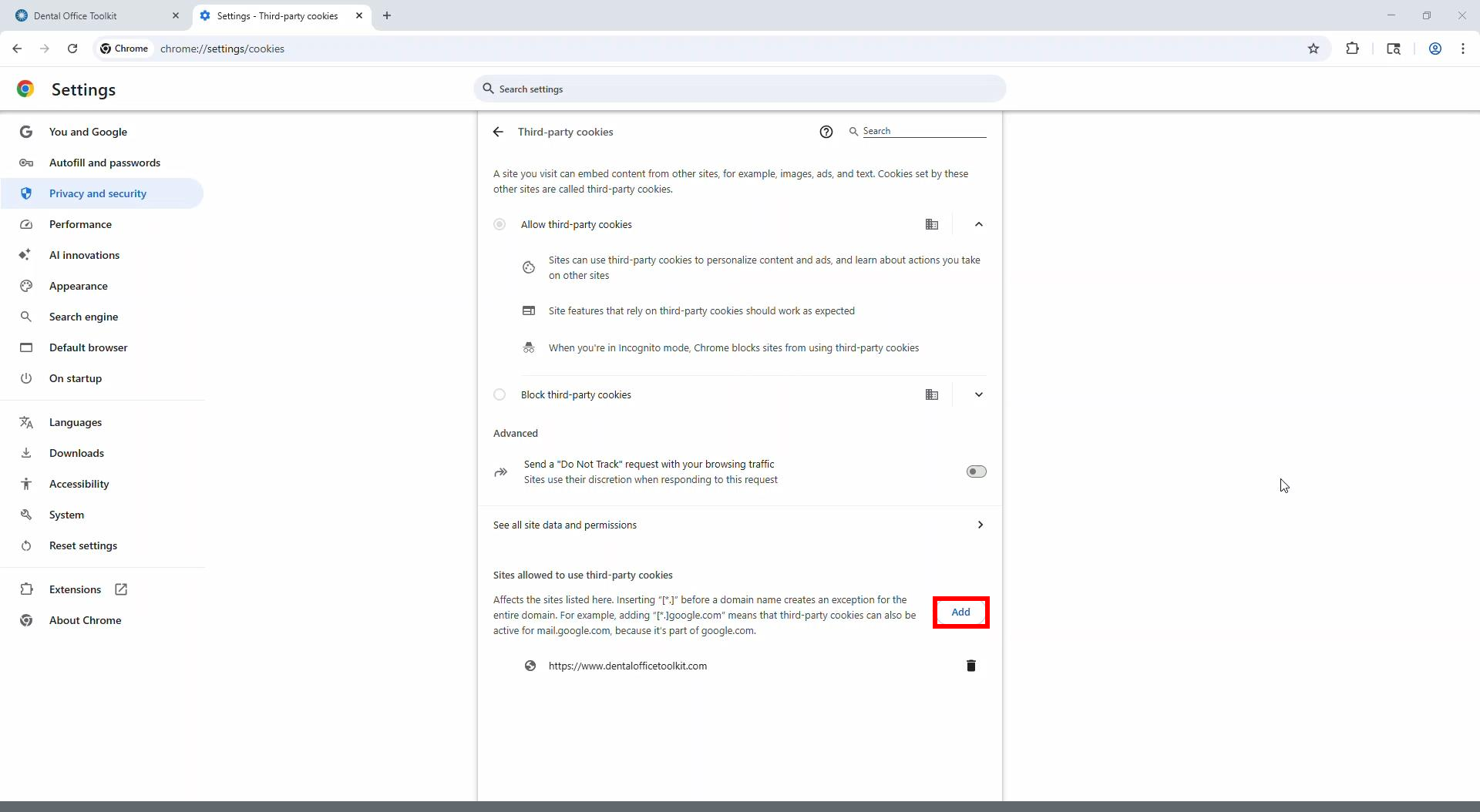
1. Navigate to Dental Office Toolkit in Google Chrome
2. Click on the three vertical dots in the top-right corner



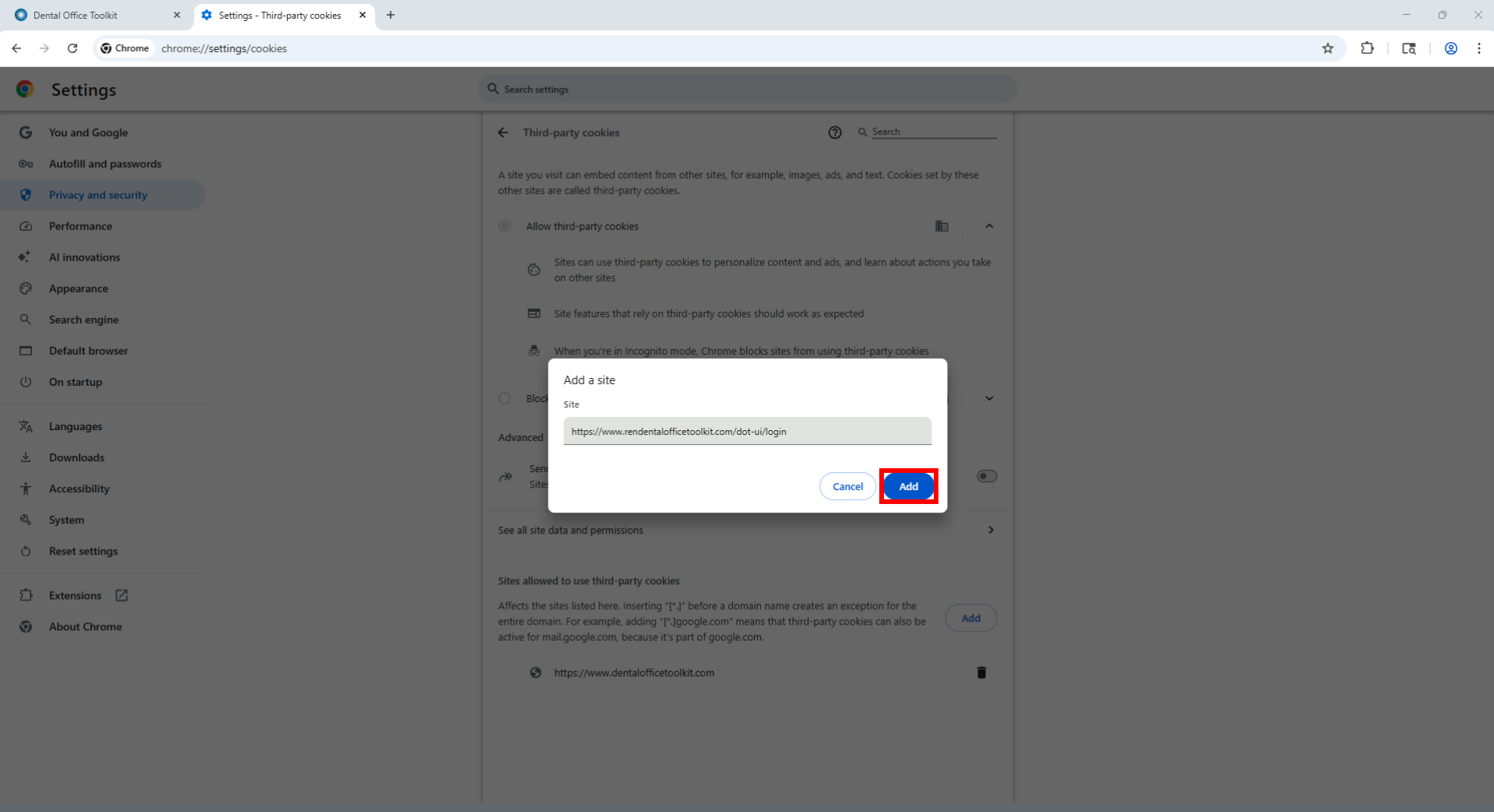
3. Click on "Settings"



4. Click on "Privacy and security" on the left-side menu
5. Click on "Third-party cookies"



6. Under Sites allowed to use third-party cookies click "Add"



7. Enter https://www.dentalofficetoolkit.com/ and click "Add"

Close out of Google Chrome and re-open it.
Navigate back to Dental Office Toolkit.

MEMBER

- Select a Member
- View and Print Member Benefits
- Search for Complete Dental History of a Member
- Search Sealant History of a Member

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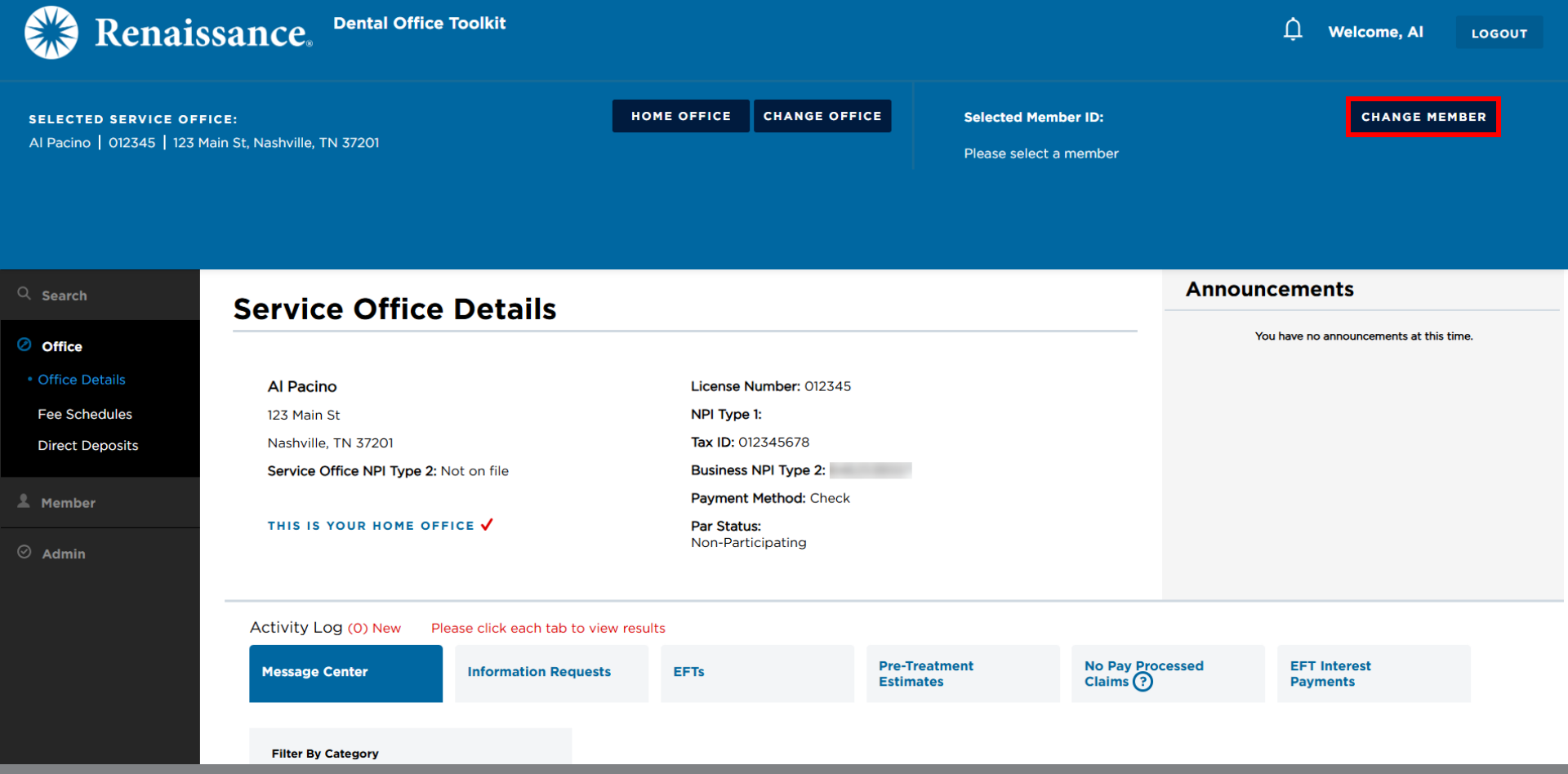
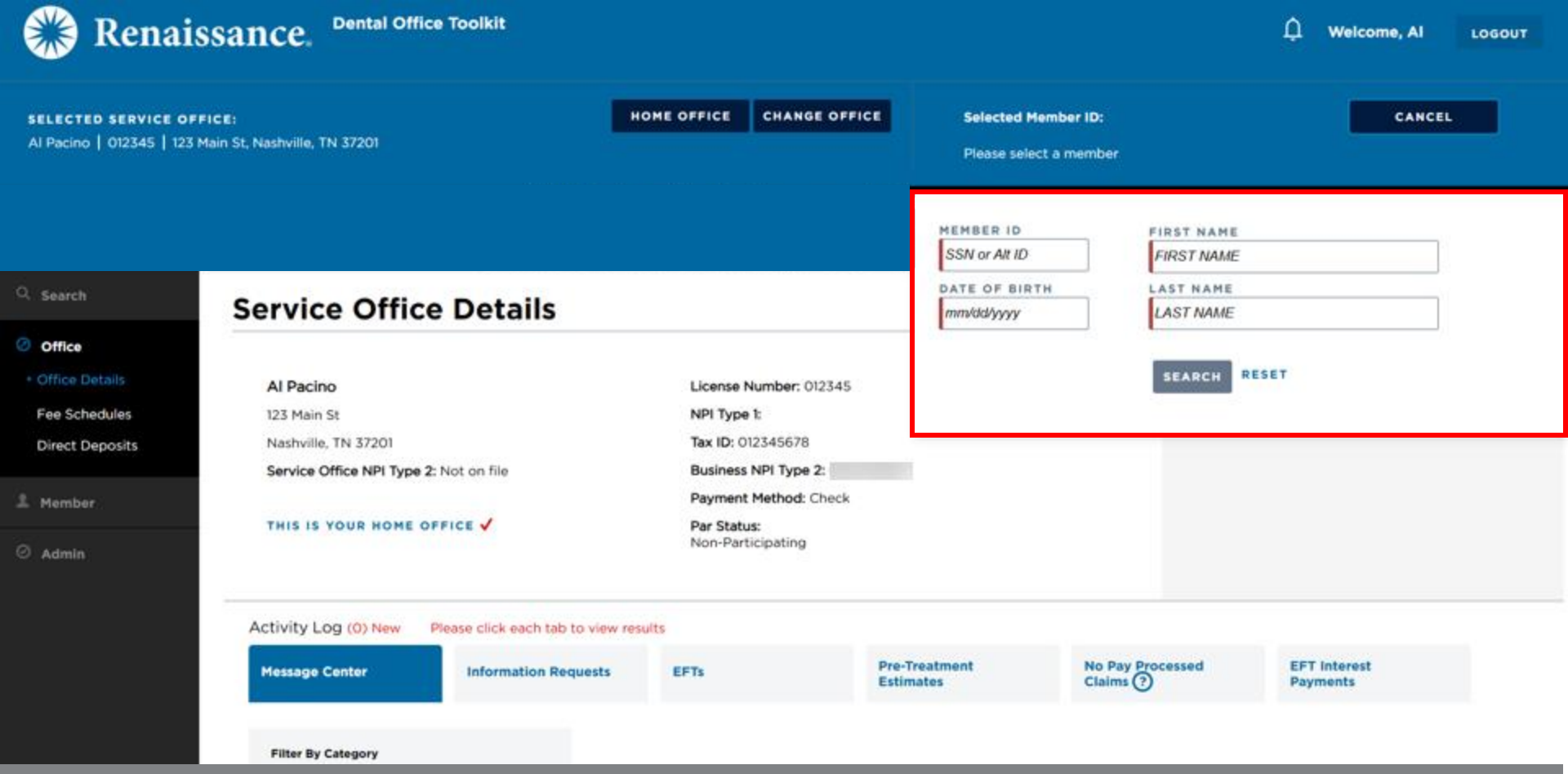
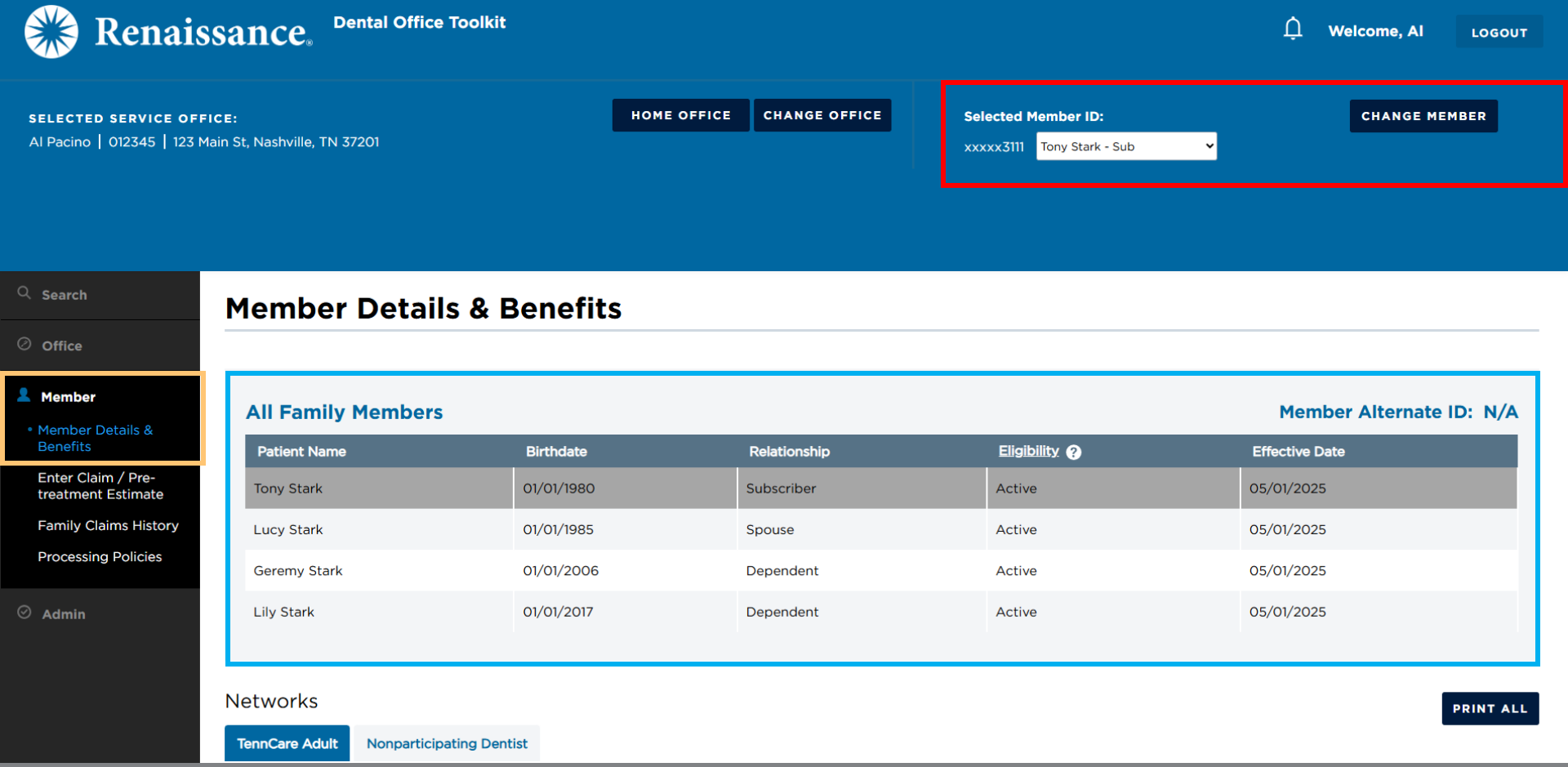
Select a Member



1. Click on the “Change Member” button on the top home bar to enter a Member ID



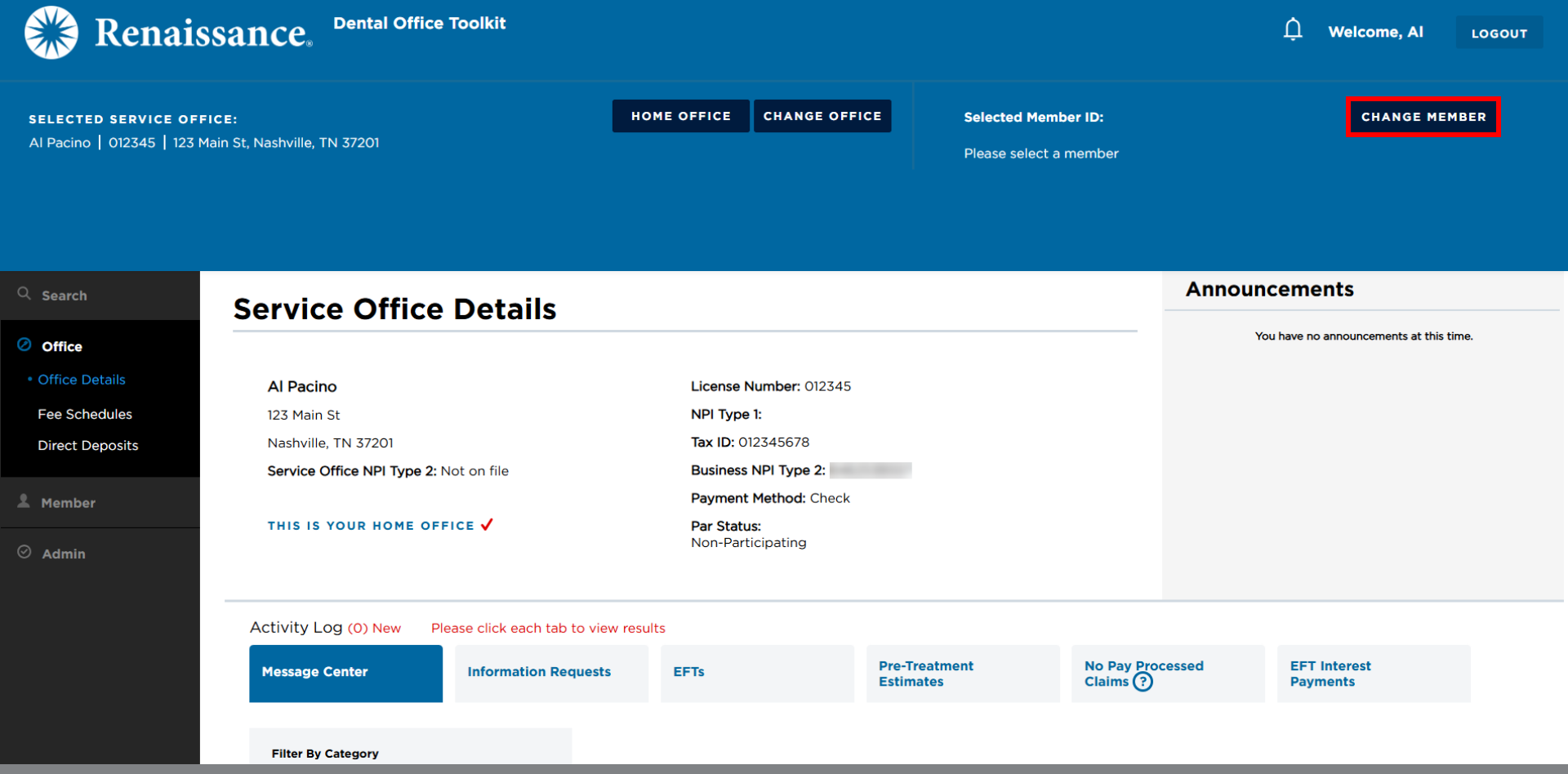
2. Type in the Member First Name, Last Name, Date of Birth, and Member ID or SSN in the appropriate fields and click “Search”



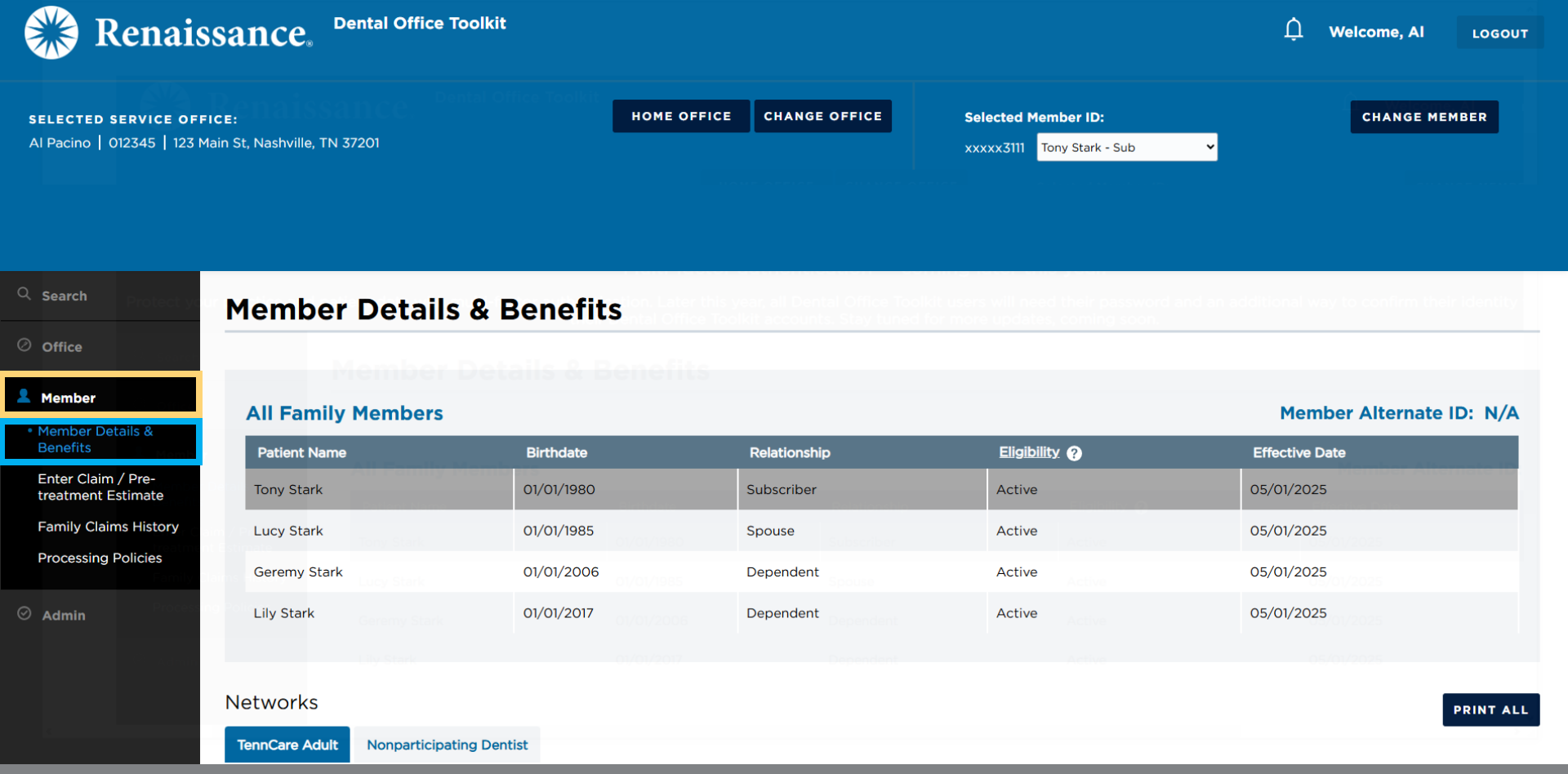
3. The orange box on the left-hand navigation bar will direct you to the member details page
4. The blue box will show the member name and relationship
5. The red box shows a quick view of the member you are viewing (by selecting the drop-down arrow, you can select a different member, ex: spouses or dependents)

Renaissance®

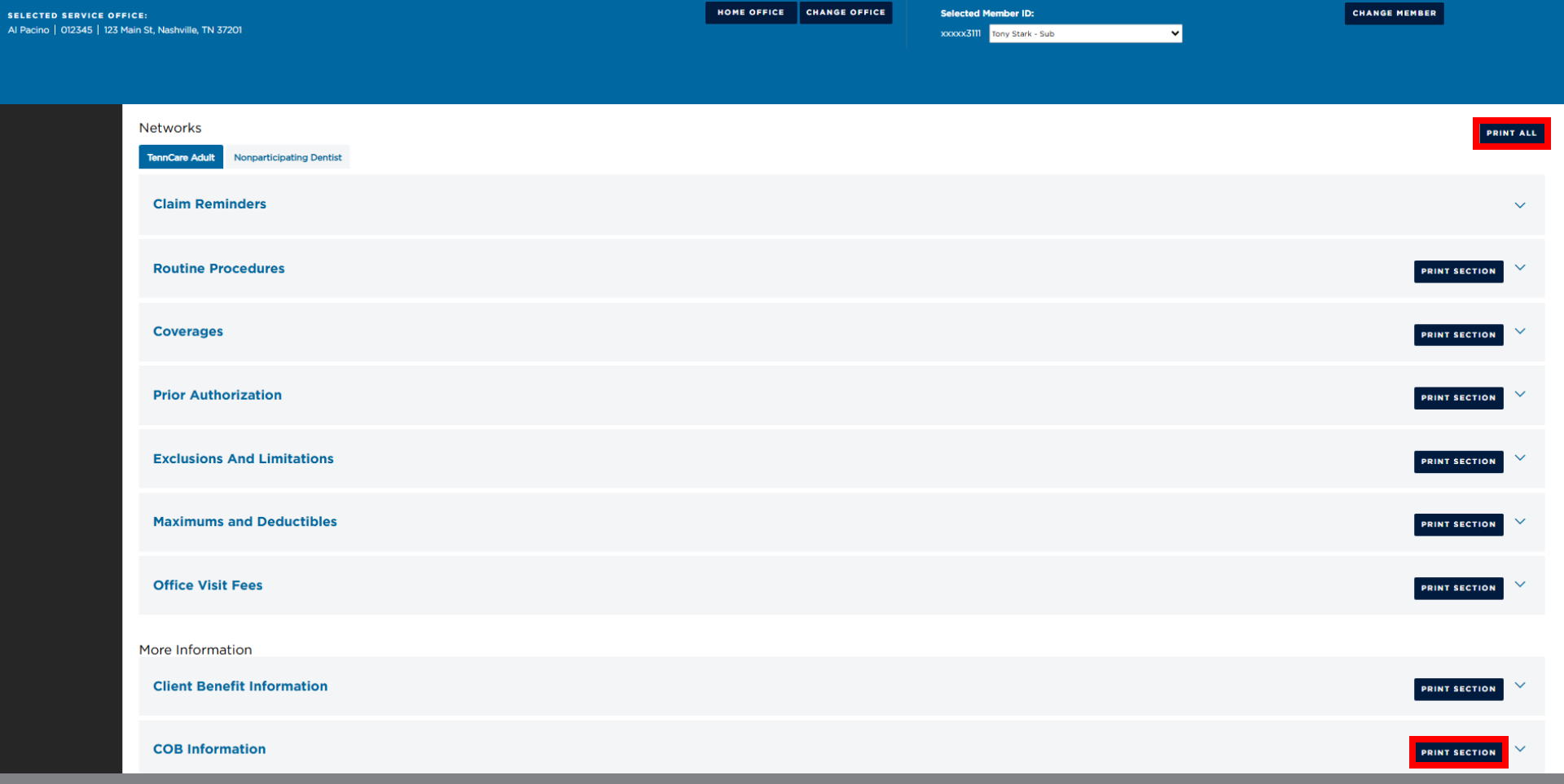
View and Print Member Benefits



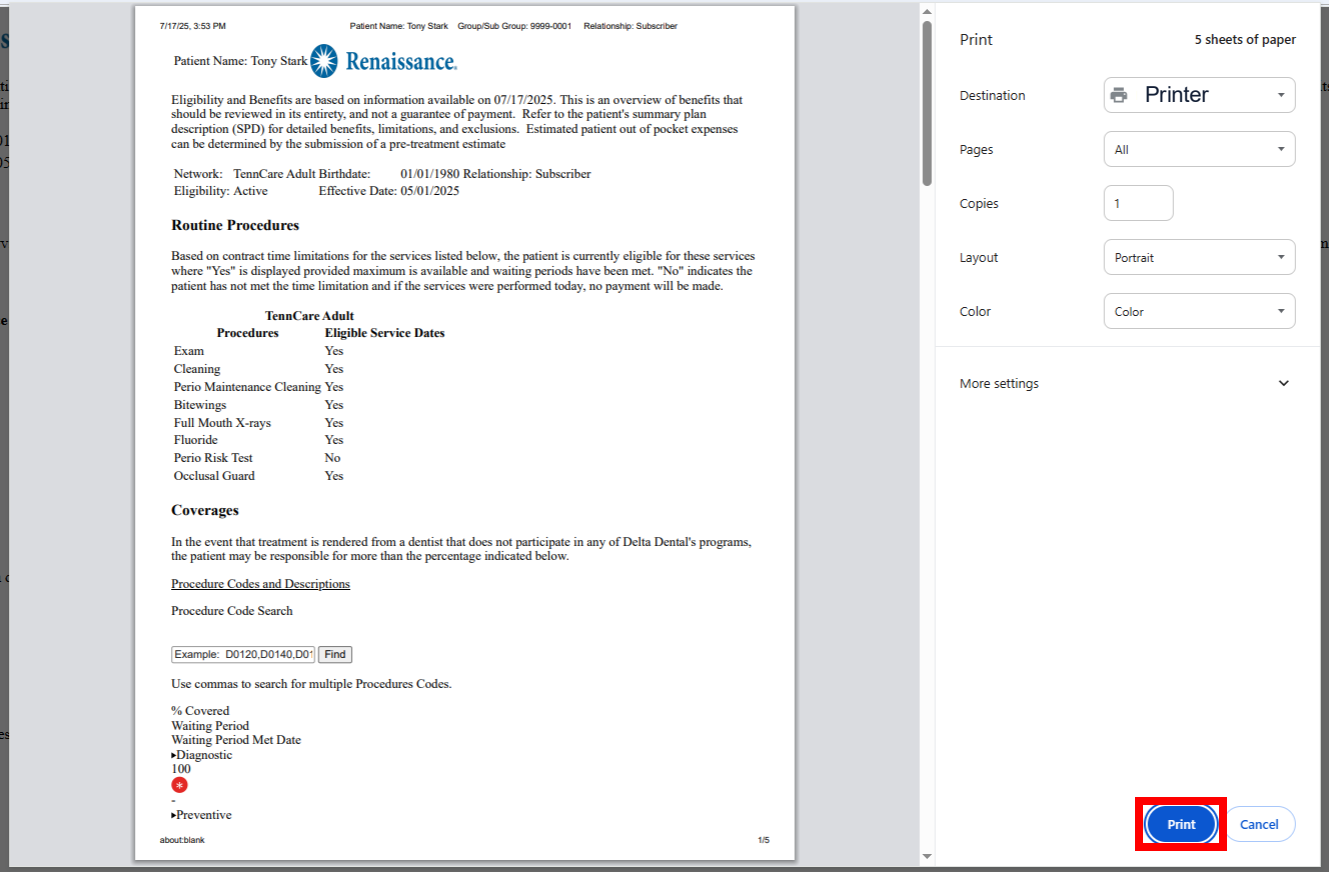
1. Click on the “Change Member” button on the top home bar to enter a Member ID
2. Type in the Member First Name, Last Name, Date of Birth, and Member ID or SSN in the appropriate fields and click “Search”



3. Navigate to the Member tab in the orange box on the left side of the screen
4. Click “Member Details & Benefits” in the blue box



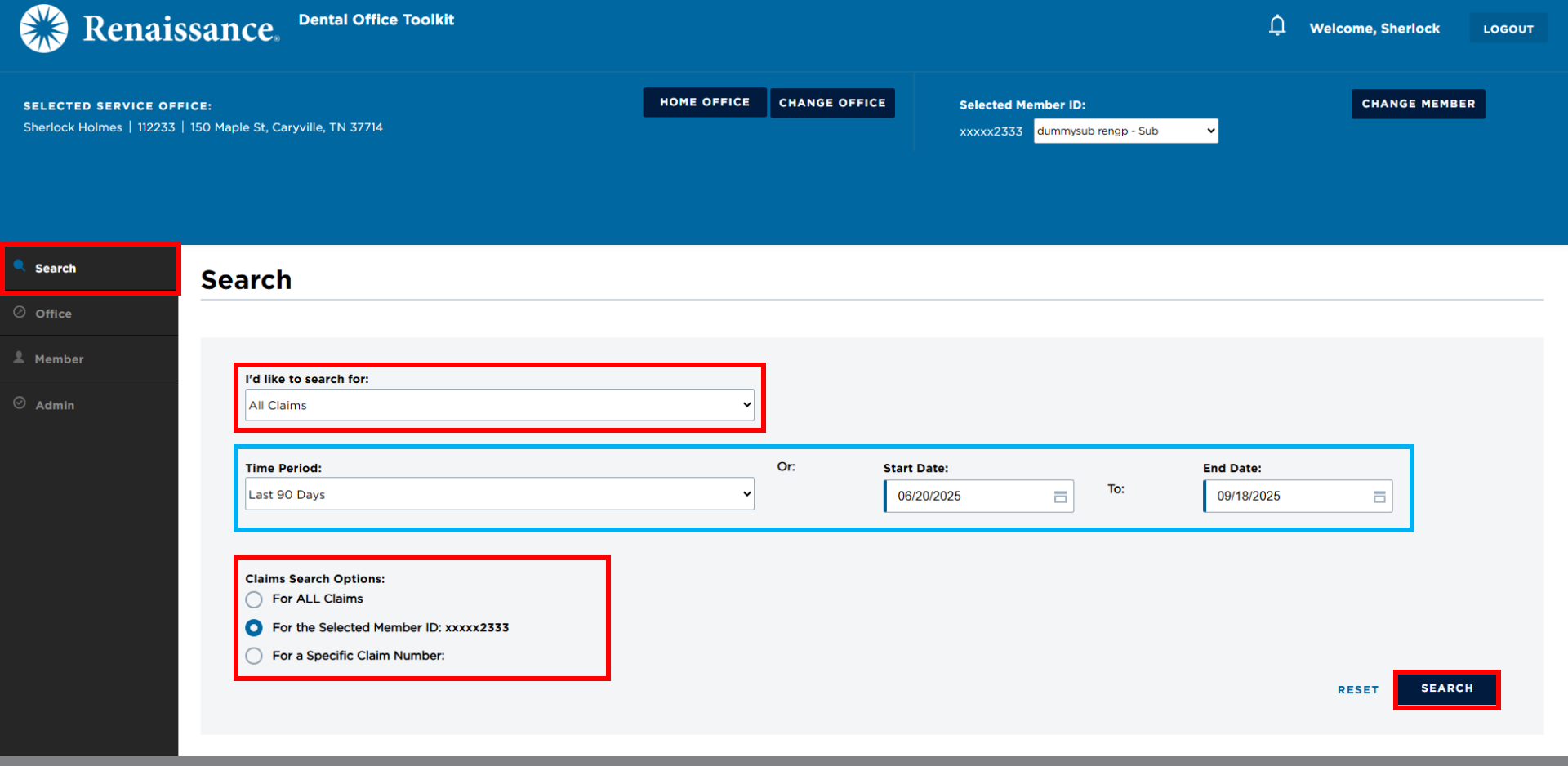
5. Select the desired Network tab and scroll down to browse the available documents
6. Click the "Print Section" button of your desired document, or click the "Print All" button located on the right side of the Networks header to print documents from all sections



7. The desired document will display on another screen
8. Click the "Print" button

Renaissance®

Search for Complete Dental History of a Member



1. Click on "Search" on the left-hand navigation bar
2. Fill out the data fields outlined in **red**
3. Enter the desired time period or start/end dates outlined in **blue**
4. Click "Search"

SELECTED SERVICE OFFICE:
Sherlock Holmes | 112233 | 150 Maple St, Caryville, TN 37714

HOME OFFICE | CHANGE OFFICE

Selected Member ID:
xxxxx2333 dummysub rengp - Sub

CHANGE MEMBER

Claims Search Options:
- For ALL Claims
- For the Selected Member ID: xxxxx2333
- For a Specific Claim Number:

RESET SEARCH

Search Results

Page 1 of 1 1-5 of 5 Records

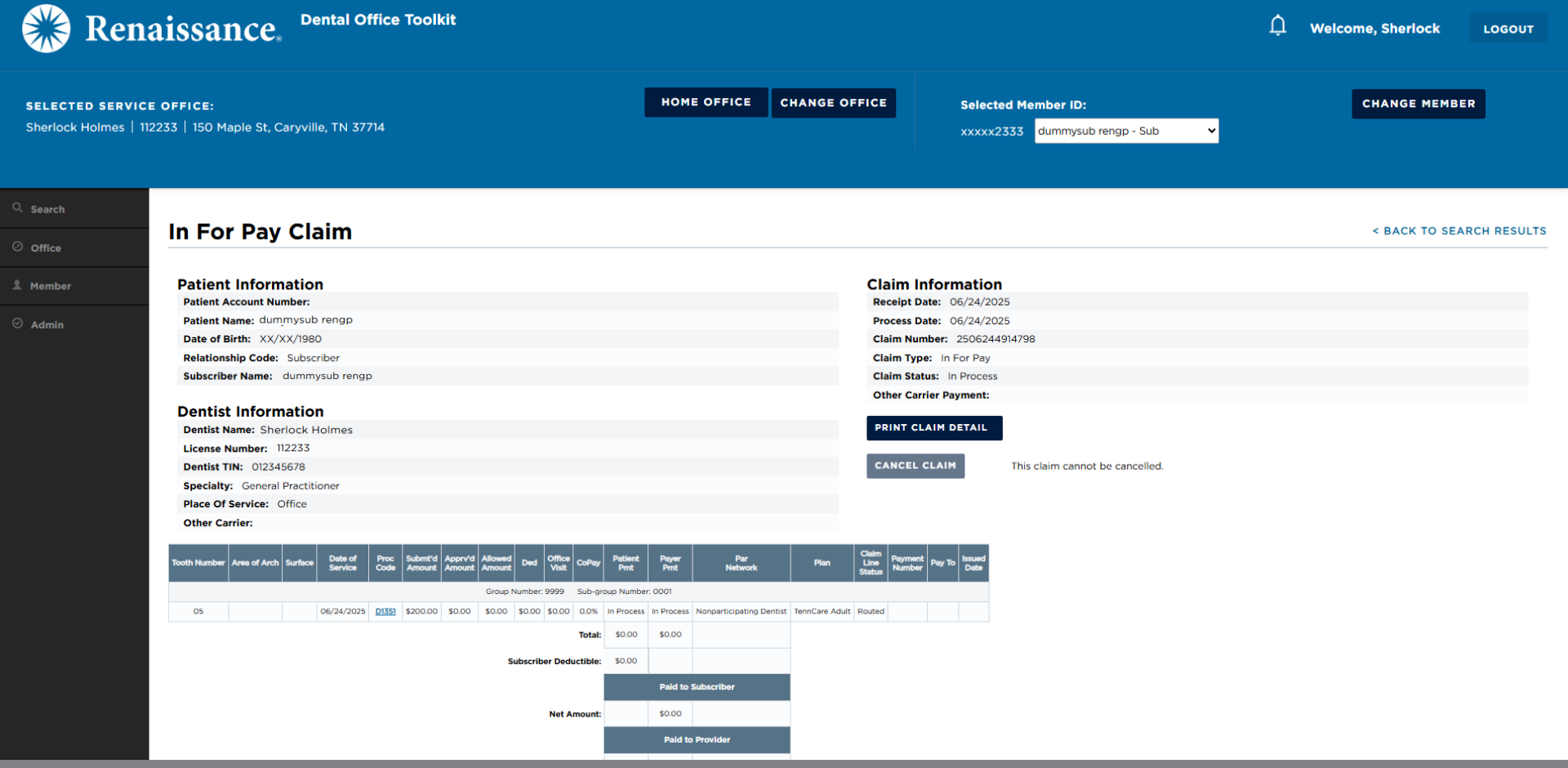
1

Service Date	Date Received	Patient Name	Claim Number	SSN	Status
06/24/2025	06/24/2025	dummysub rengp	2506244914804	xxxxx3111	Denied
06/24/2025	06/24/2025	dummysub rengp	2506244914798	xxxxx3111	In Process
N/A	06/20/2025	dummysub rengp	2506204737853	xxxxx3111	Denied
06/04/2025	06/20/2025	dummysub rengp	2506204737851	xxxxx3111	In Process
06/16/2025	06/20/2025	dummysub rengp	2506204737850	xxxxx3111	In Process

Page 1 of 1 1-5 of 5 Records

1

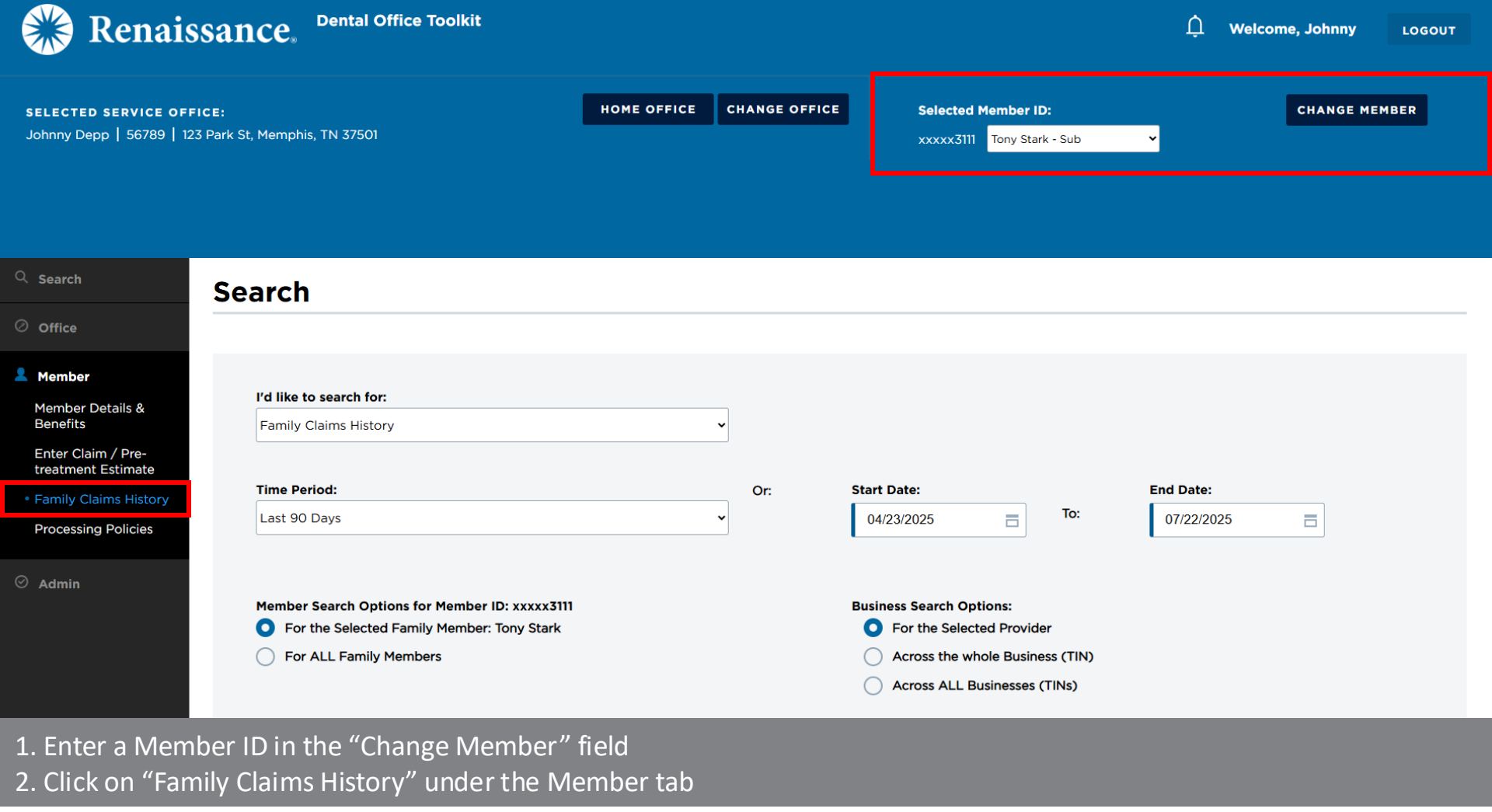
5. View search results
6. Click on any claim number to view details



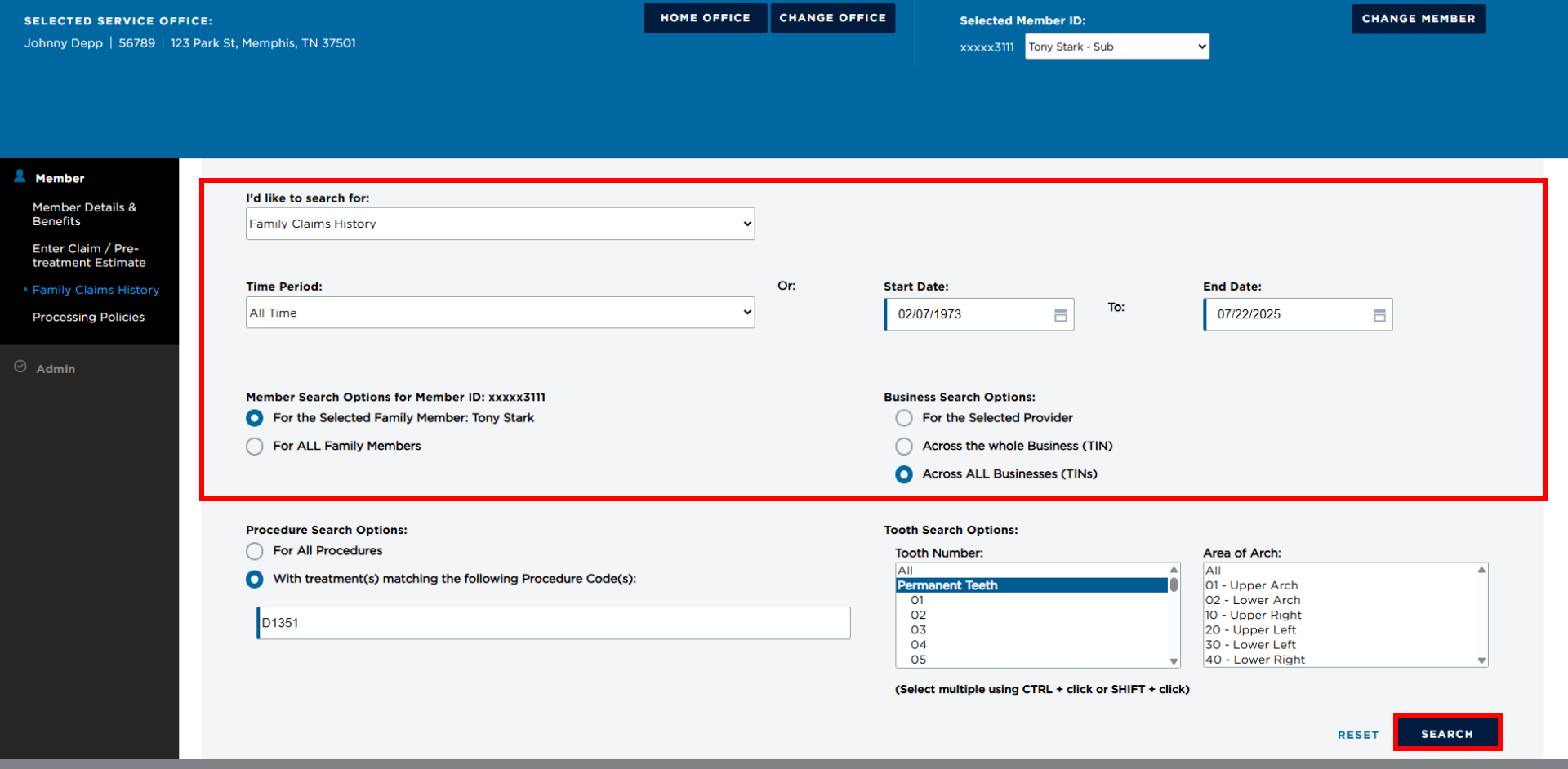
7. View claim details

Renaissance®

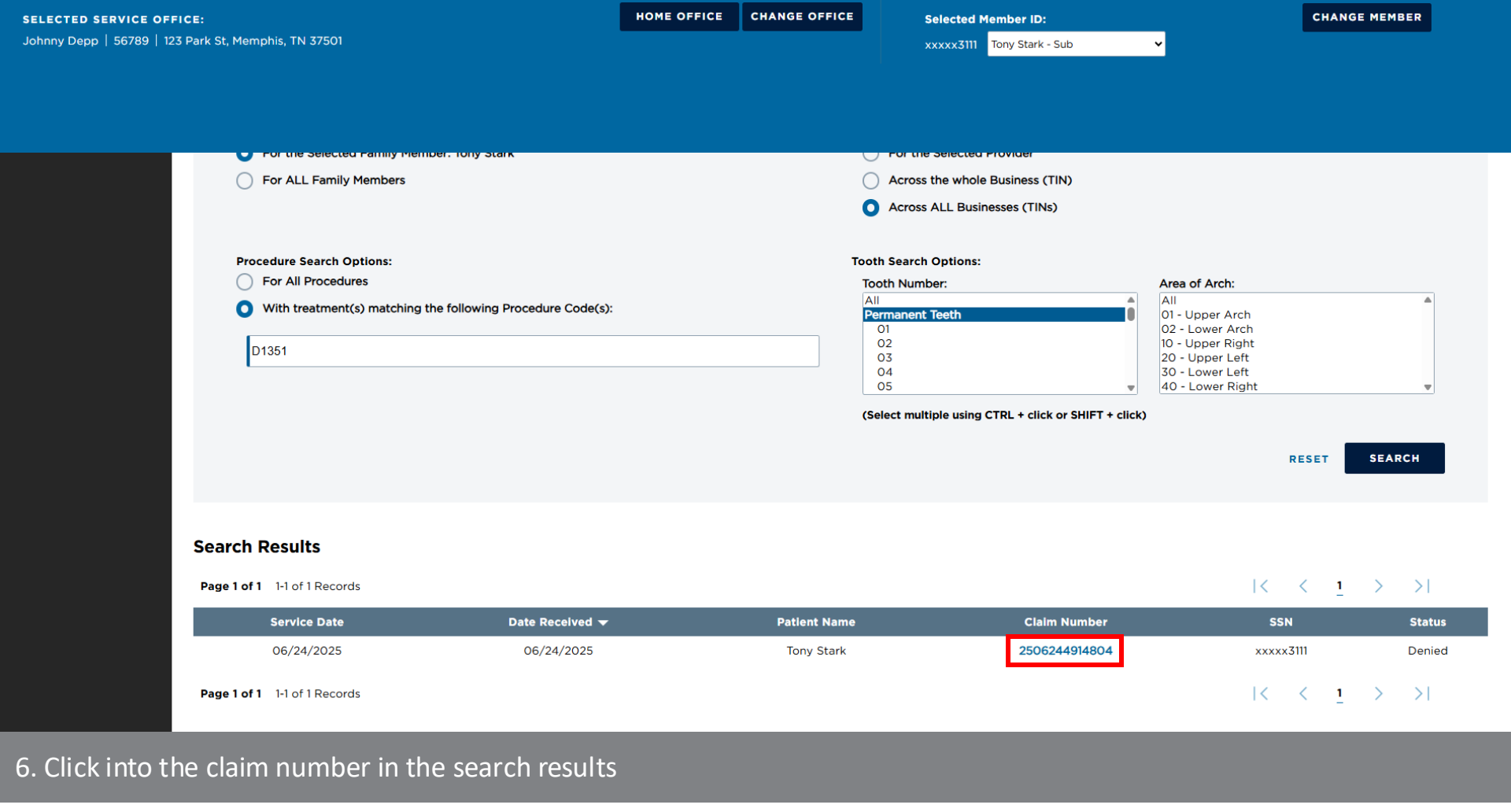
Search Sealant History of a Member



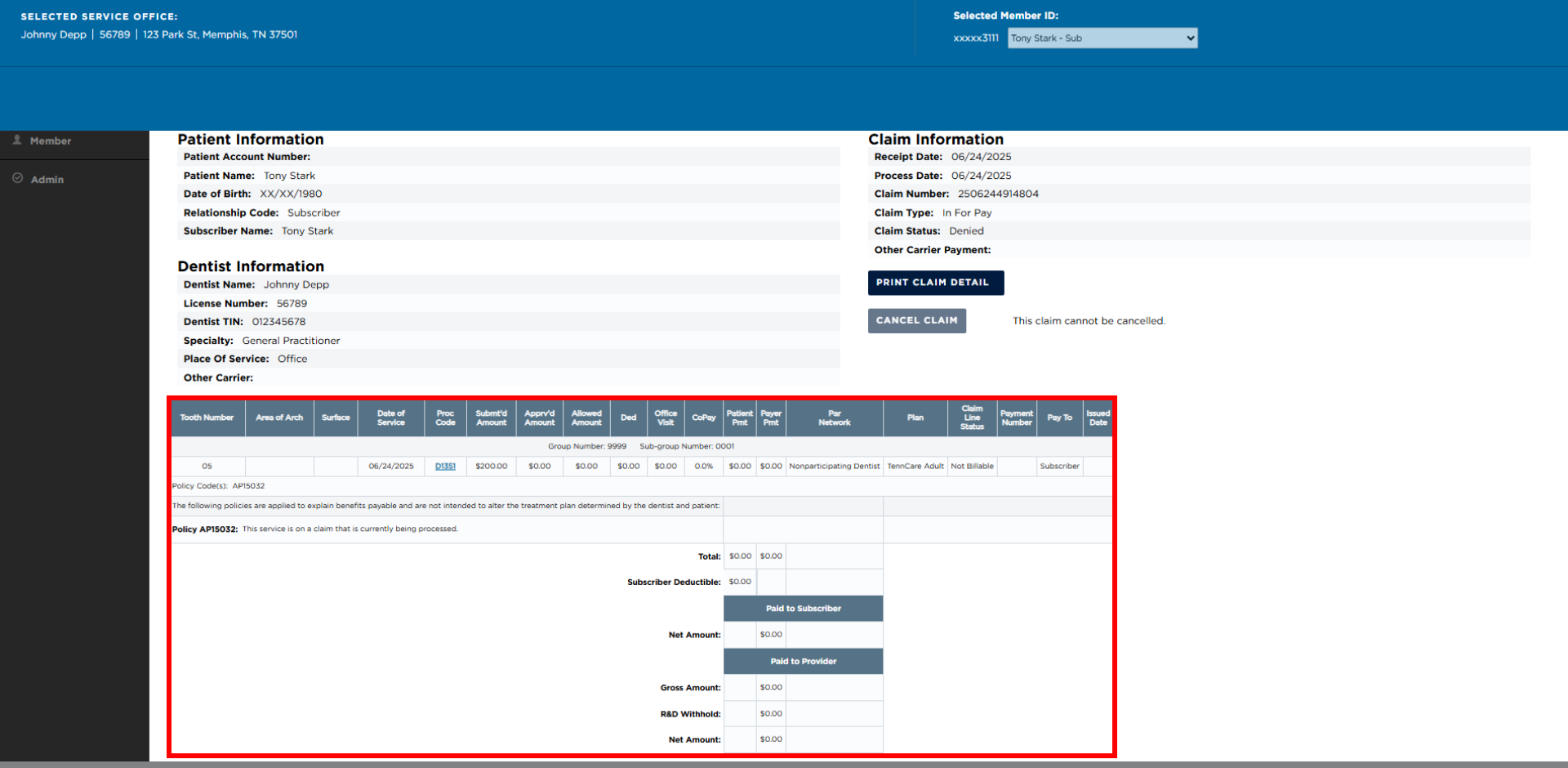
1. Enter a Member ID in the “Change Member” field
2. Click on “Family Claims History” under the Member tab



3. Select the criteria noted above (you can select any time period)
4. Enter the procedure code “D1351” for sealants
5. Click “Search”



6. Click into the claim number in the search results



7. Review the date of service and claim line status to understand sealant eligibility

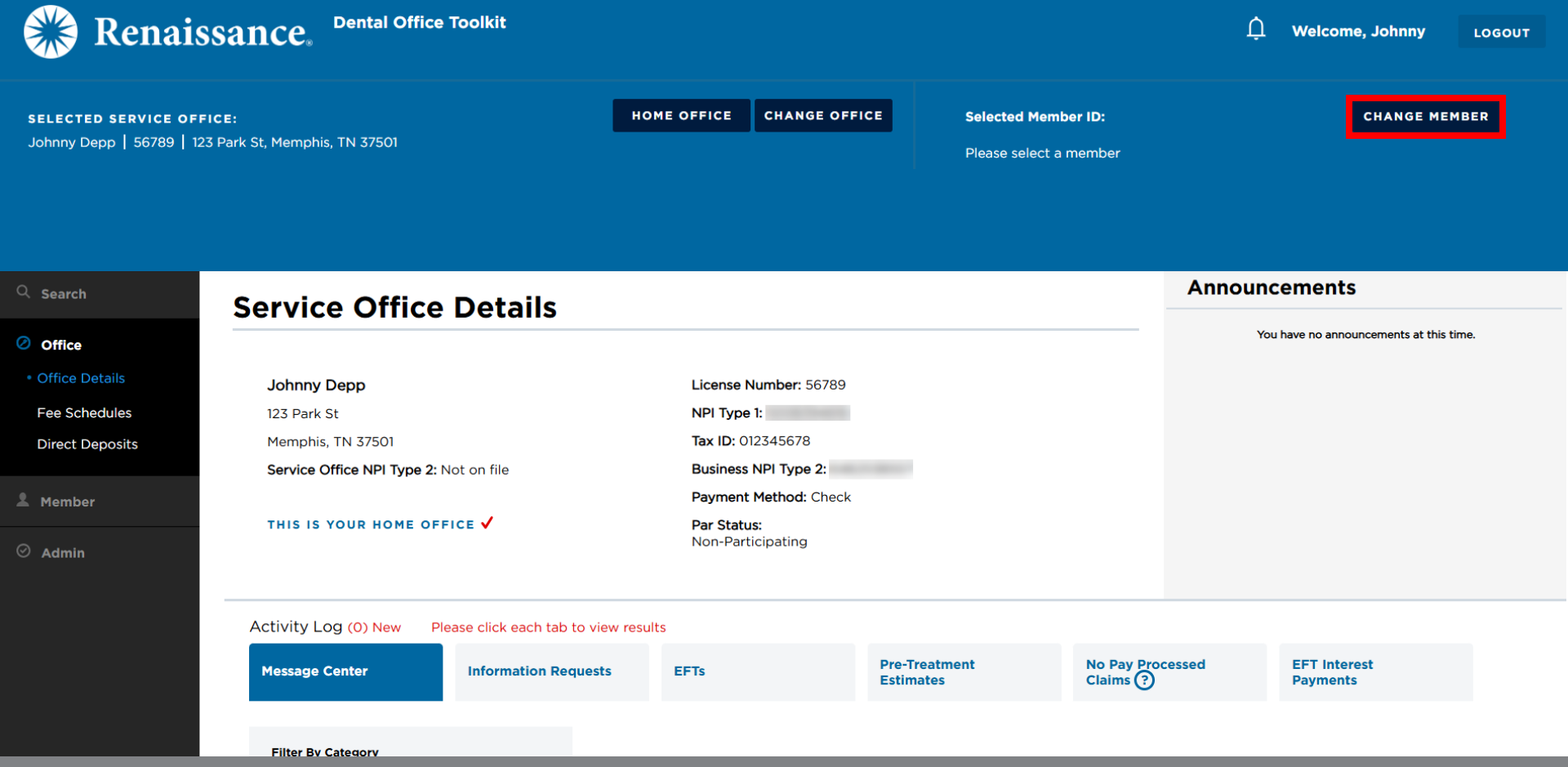
MEMBER CLAIMS

- Submit a Pre-treatment Estimate (PTE)
- Convert a Pre-treatment Estimate to a Claim
- Submit a Claim
- Search for a Claim
- Search Family Claims History Across Businesses
- Cancel a Claim

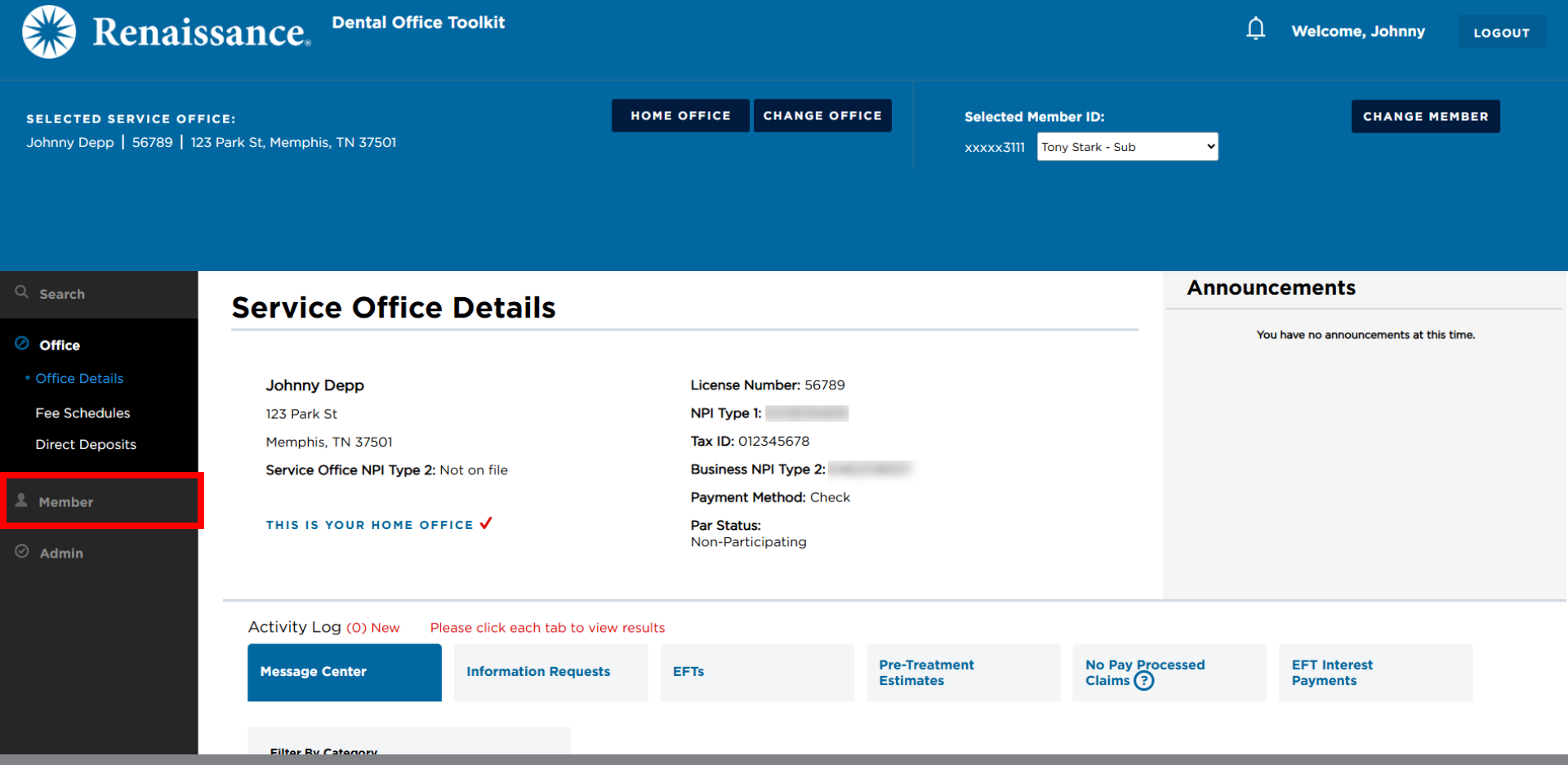
Renaissance®

Submit a Pre-treatment Estimate (PTE)

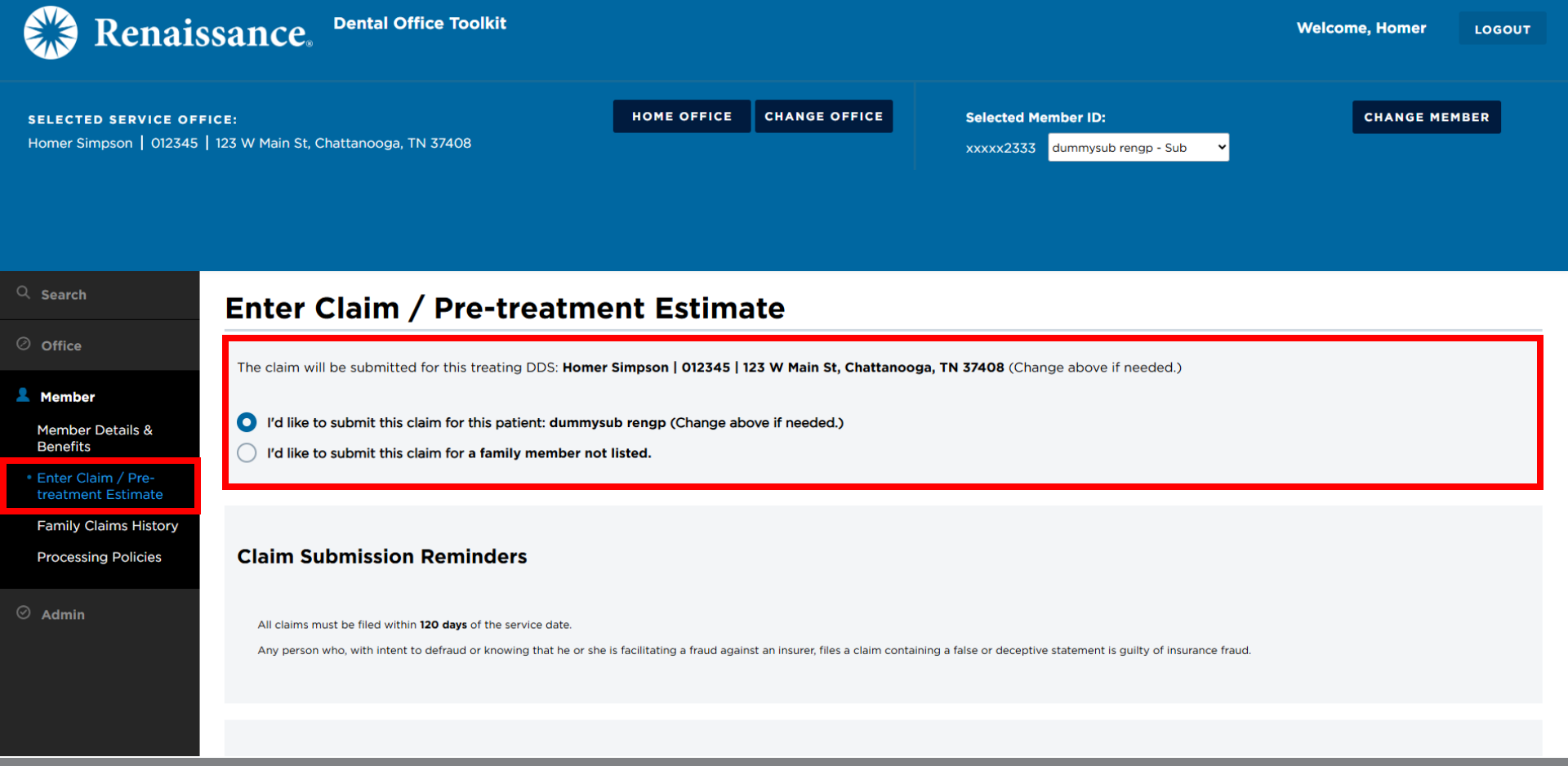
Pre-treatment estimates are for prior authorization procedures only and this procedure does not require prior authorization.



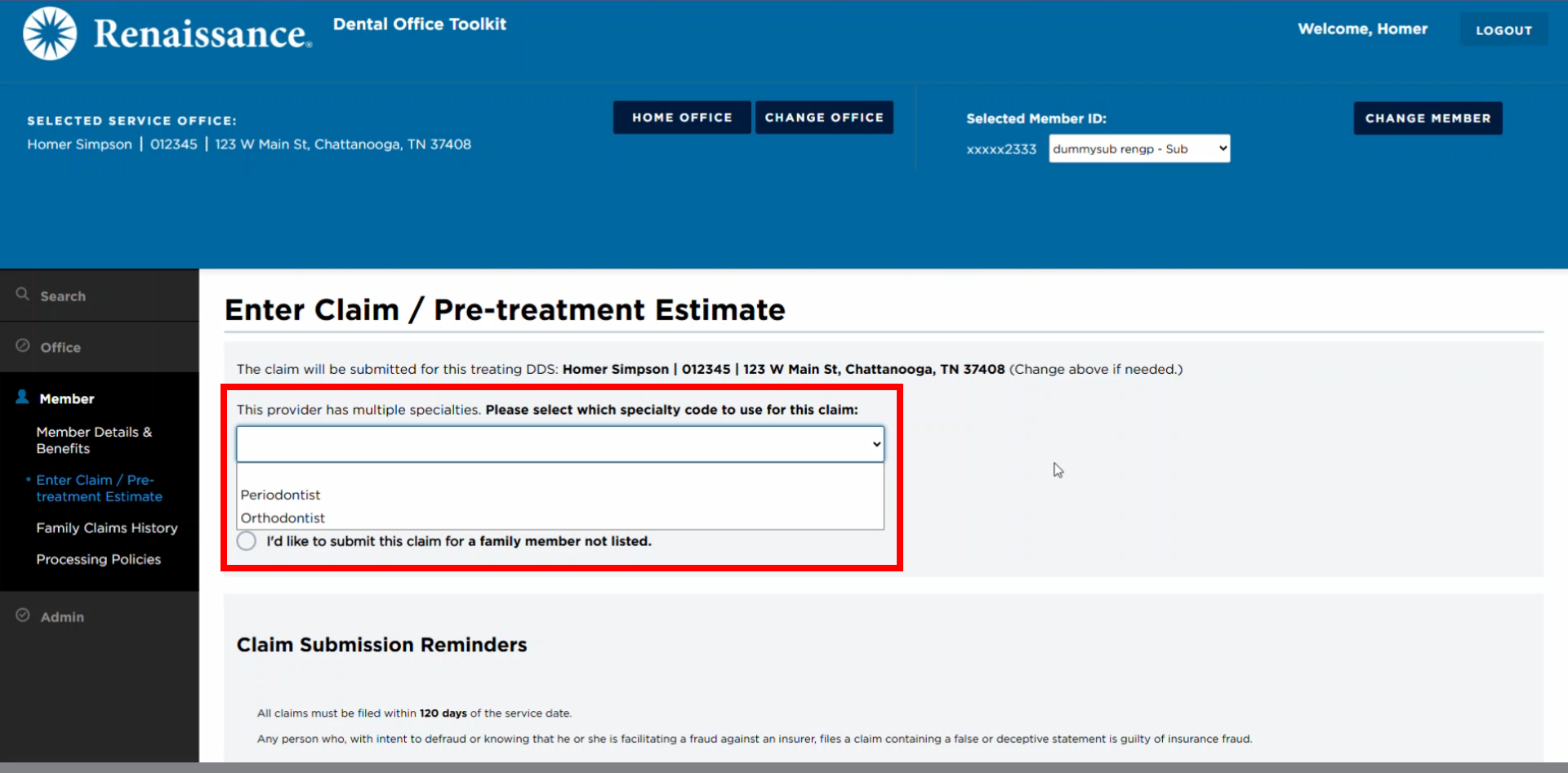
1. Enter the member you would like to submit a pre-treatment estimate for



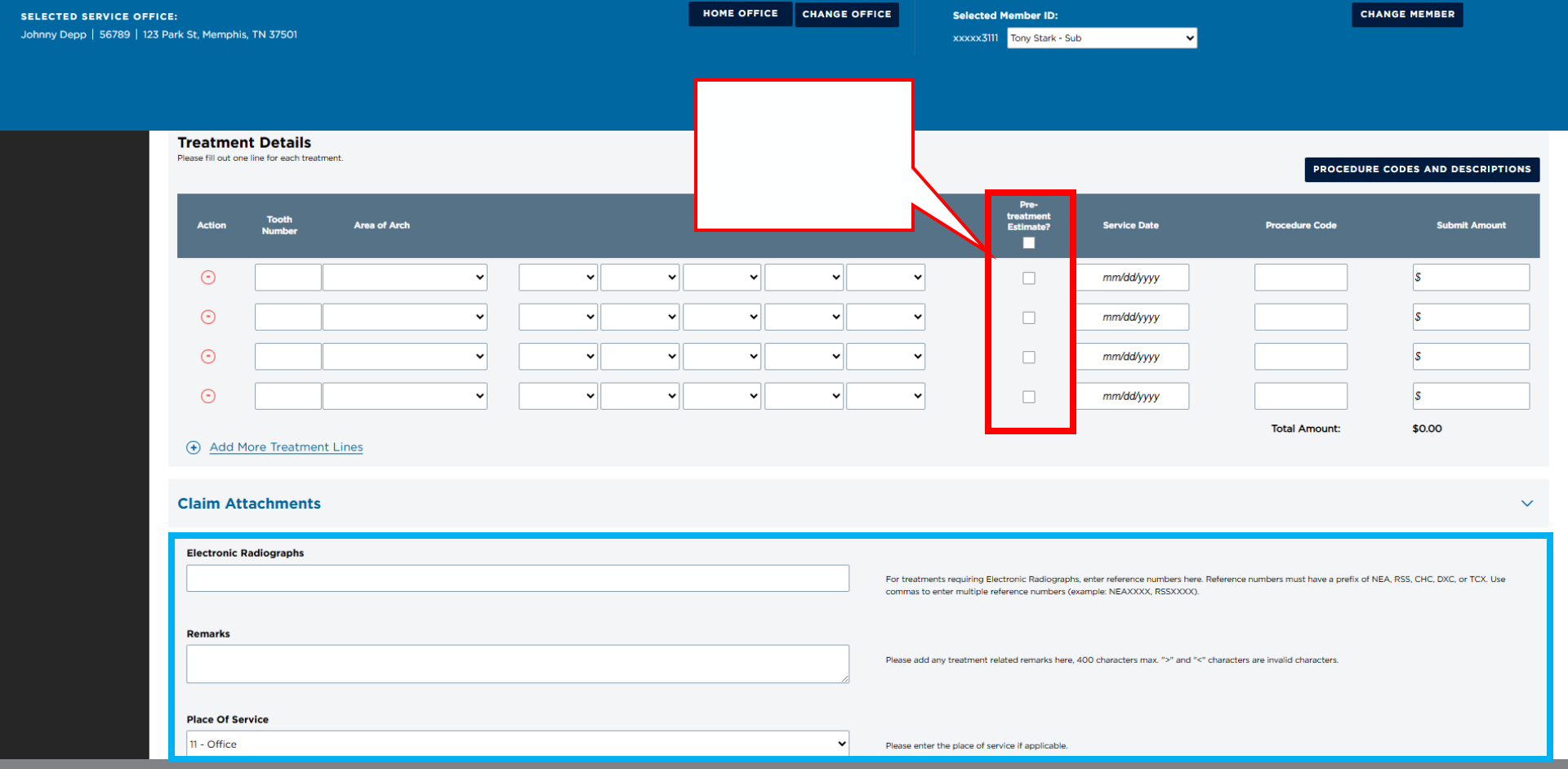
2. Once the member has been selected, click the “Member” tab on the left-hand navigation bar



3. Click “Enter Claim/Pre-treatment Estimate” on the left-hand navigation bar
4. Select the member you would like to submit the Pre-treatment Estimate for



NOTE: When submitting a claim or PTE for a Dentist with multiple specialties, please select the specialty code to use for a claim



5. Enter the “Tooth Number,” “Area of Arch,” and “Surfaces” fields
6. Select the “Pre-Treatment Estimate” box
7. Enter “Procedure Code” and “Submit Amount” (repeat steps 5-7 if there are multiple treatment lines)
8. Fill in any additional claim details below if they are applicable to the claim you are entering

SELECTED SERVICE OFFICE:
Johnny Depp | 56789 | 123 Park St, Memphis, TN 37501

HOME OFFICE | CHANGE OFFICE

Selected Member ID:
xxxxx3111 Tony Stark - Sub

CHANGE MEMBER

mm/dd/yyyy

$

Total Amount: $0.00

Add More Treatment Lines

Claim Attachments

Upload Documents

CHOOSE OR DROP FILES

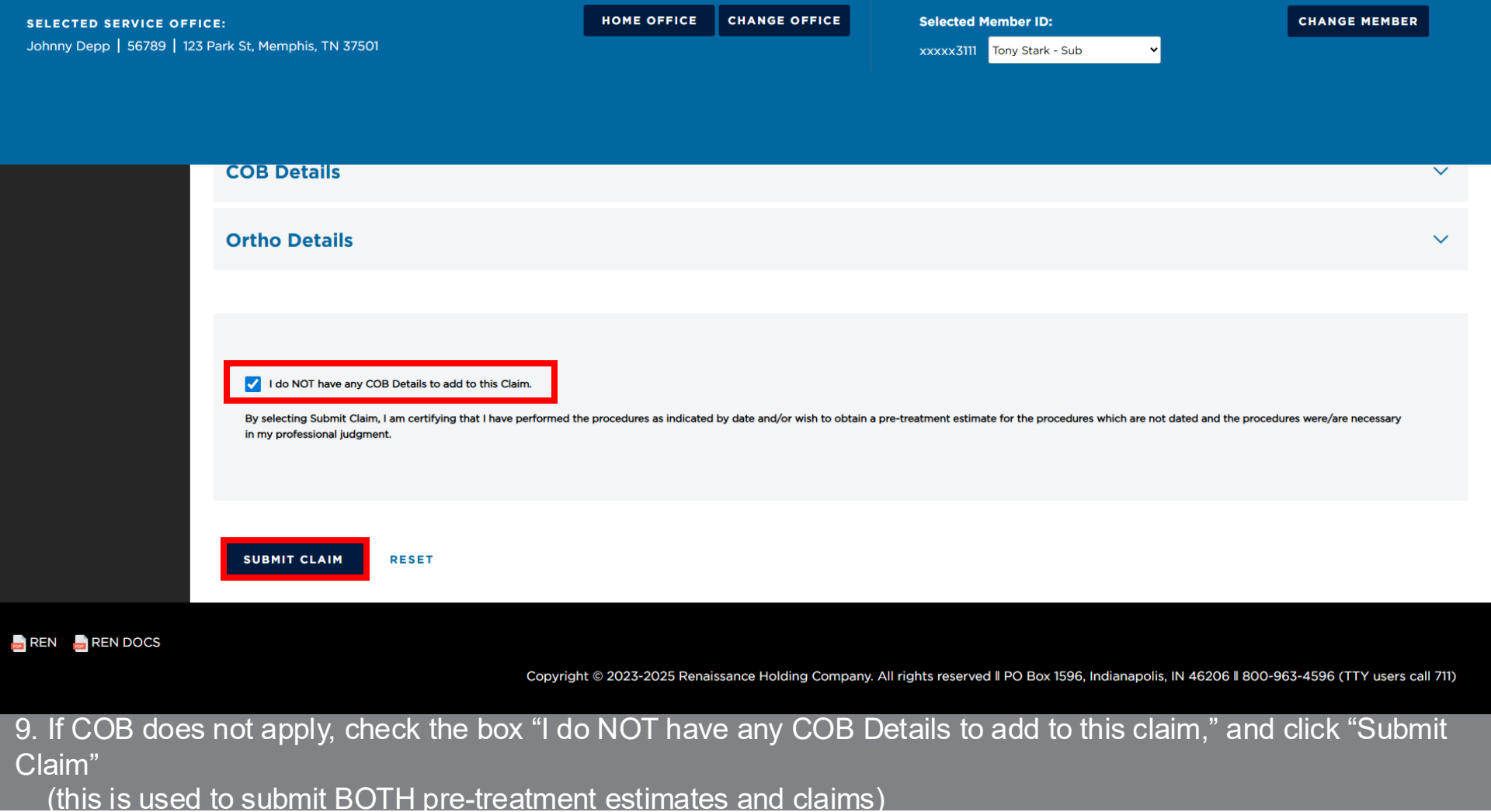
Electronic Radiographs

For treatments requiring Electronic Radiographs, enter reference numbers here. Reference numbers must have a prefix of NEA, RSS, CHC, DXC, or TCX. Use commas to enter multiple reference numbers (example: NEAXXXX, RSSXXXX).

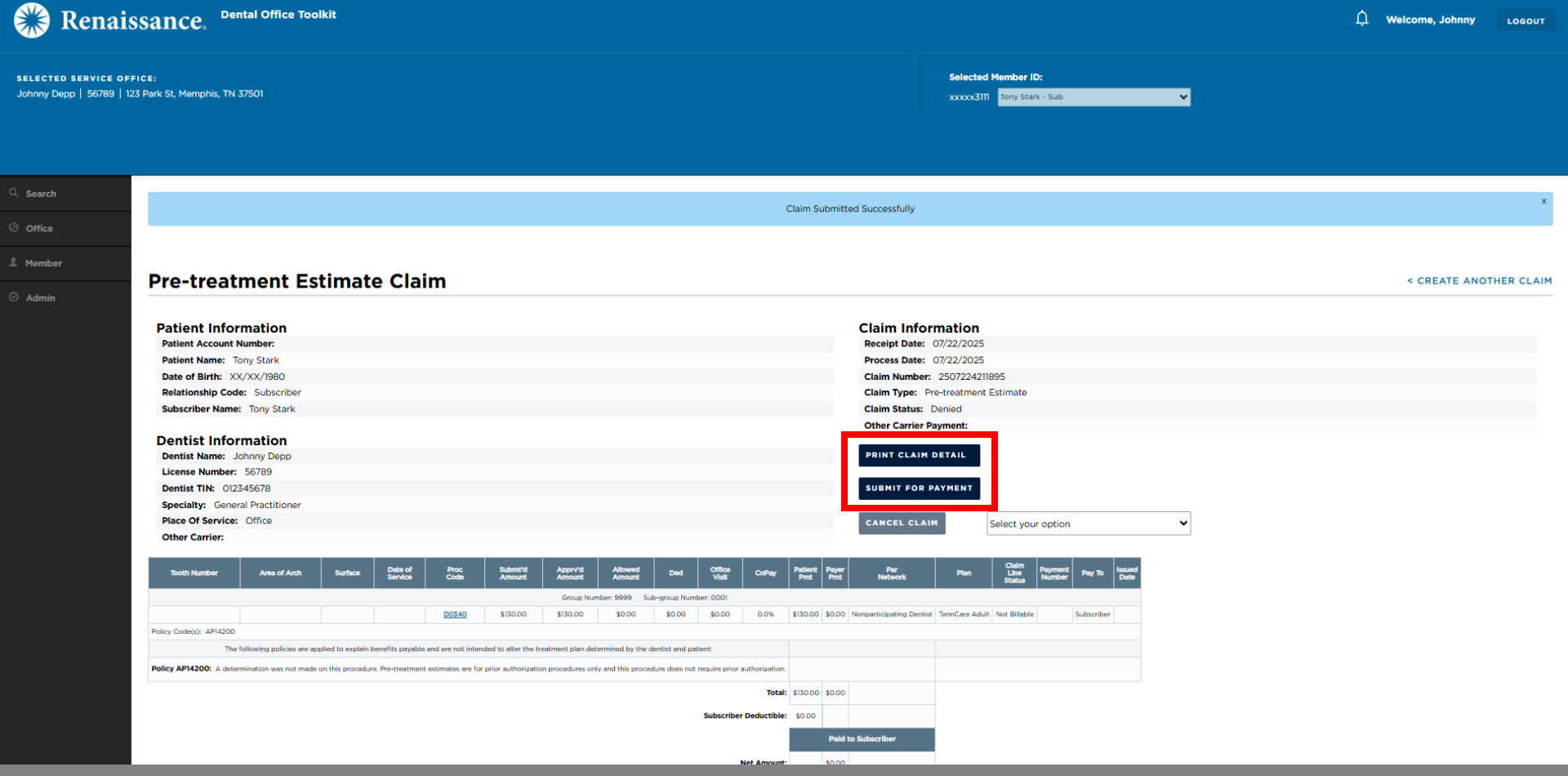
Remarks

Please add any treatment related remarks here, 400 characters max. ">" and "<" characters are invalid characters.

NOTE: Claim Attachments allows users to upload documents by searching their File Explorer or dropping the file from the users' desktop.



9. If COB does not apply, check the box “I do NOT have any COB Details to add to this claim,” and click “Submit Claim”
(this is used to submit BOTH pre-treatment estimates and claims)

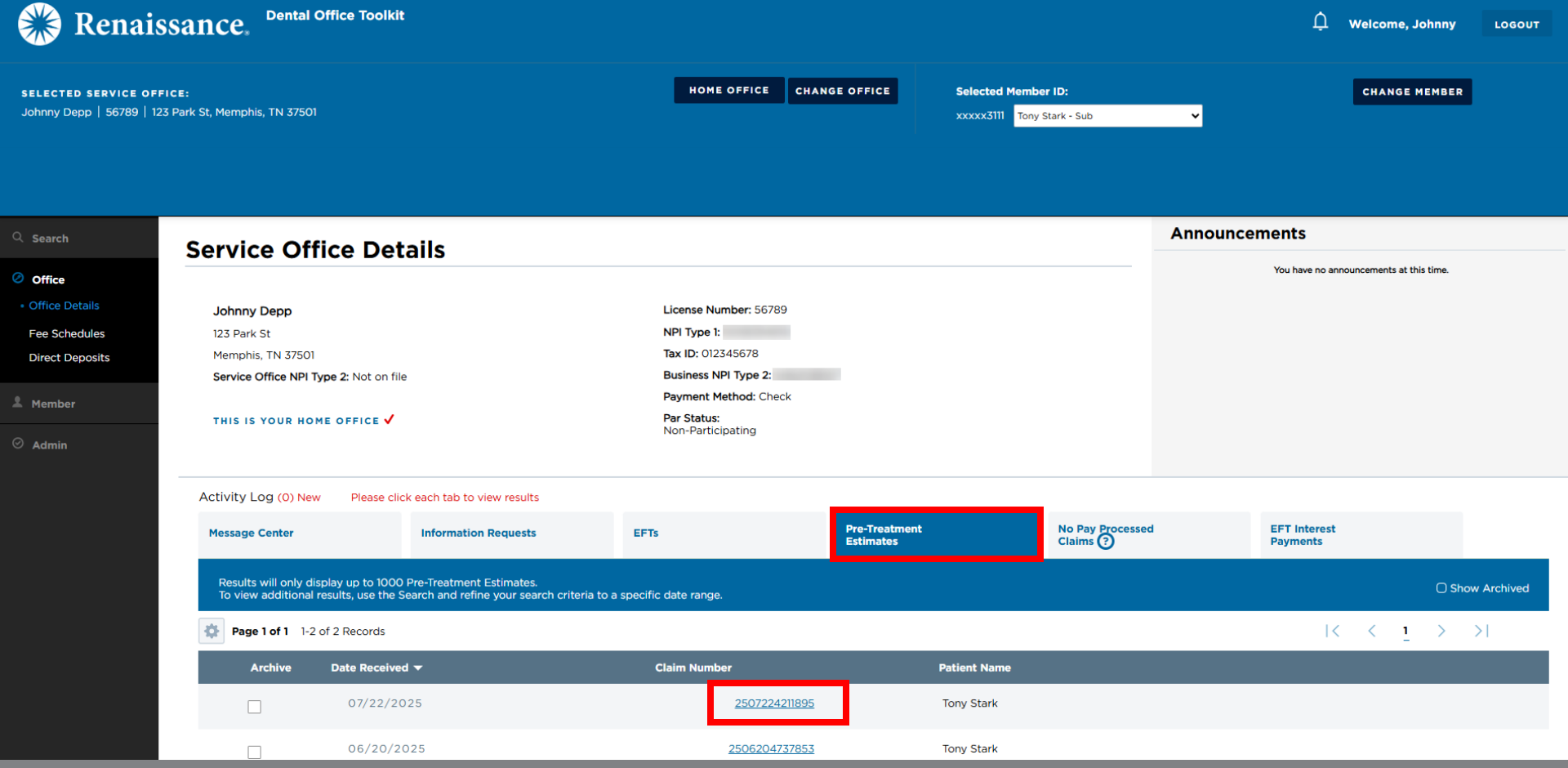


10. Review pre-treatment estimate details
11. There are options to “Print Claim Detail” or “Submit for Payment”

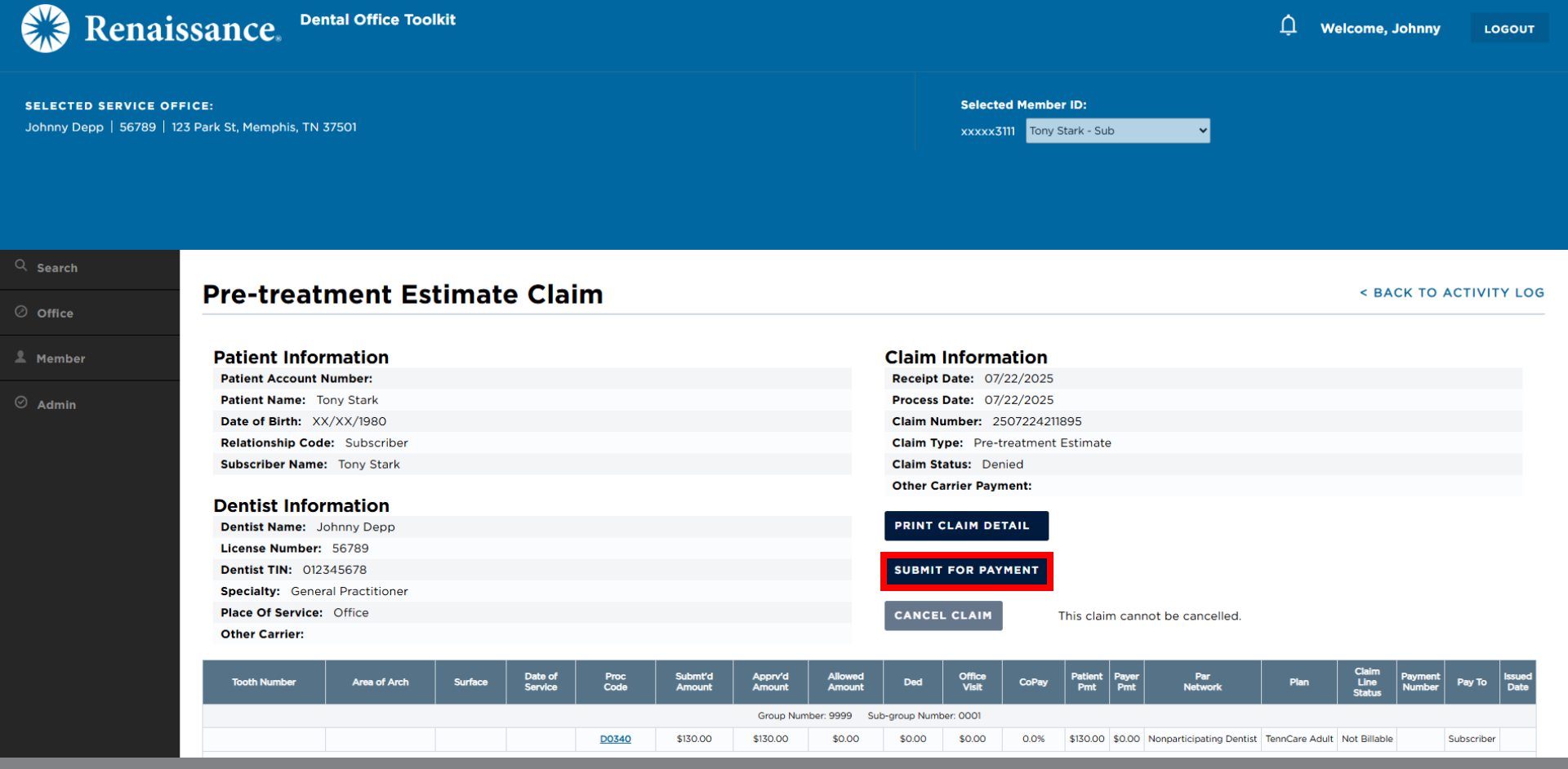
Renaissance®

Convert a Pre-treatment Estimate to a Claim

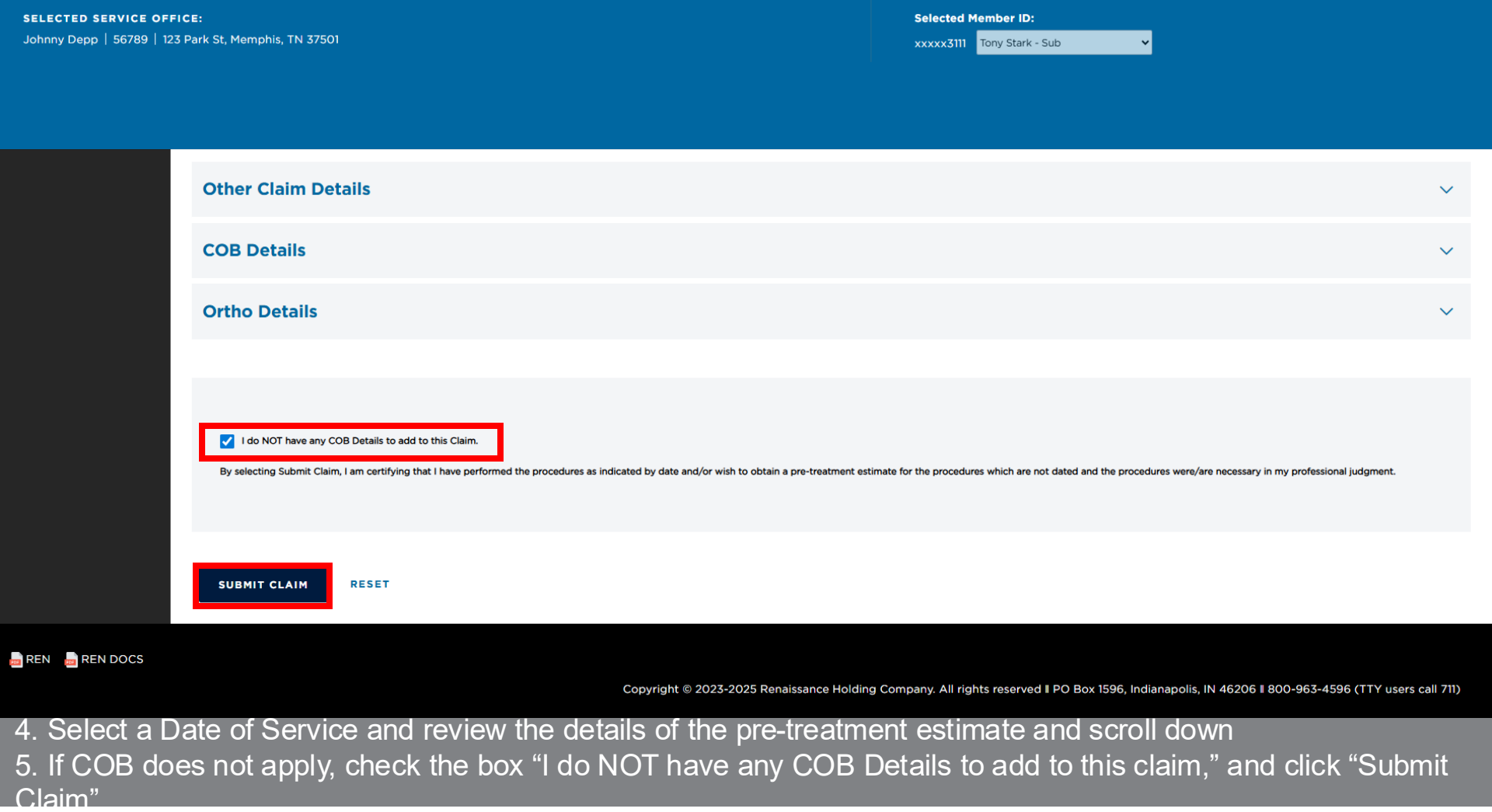
Option 1—From the Activity Log



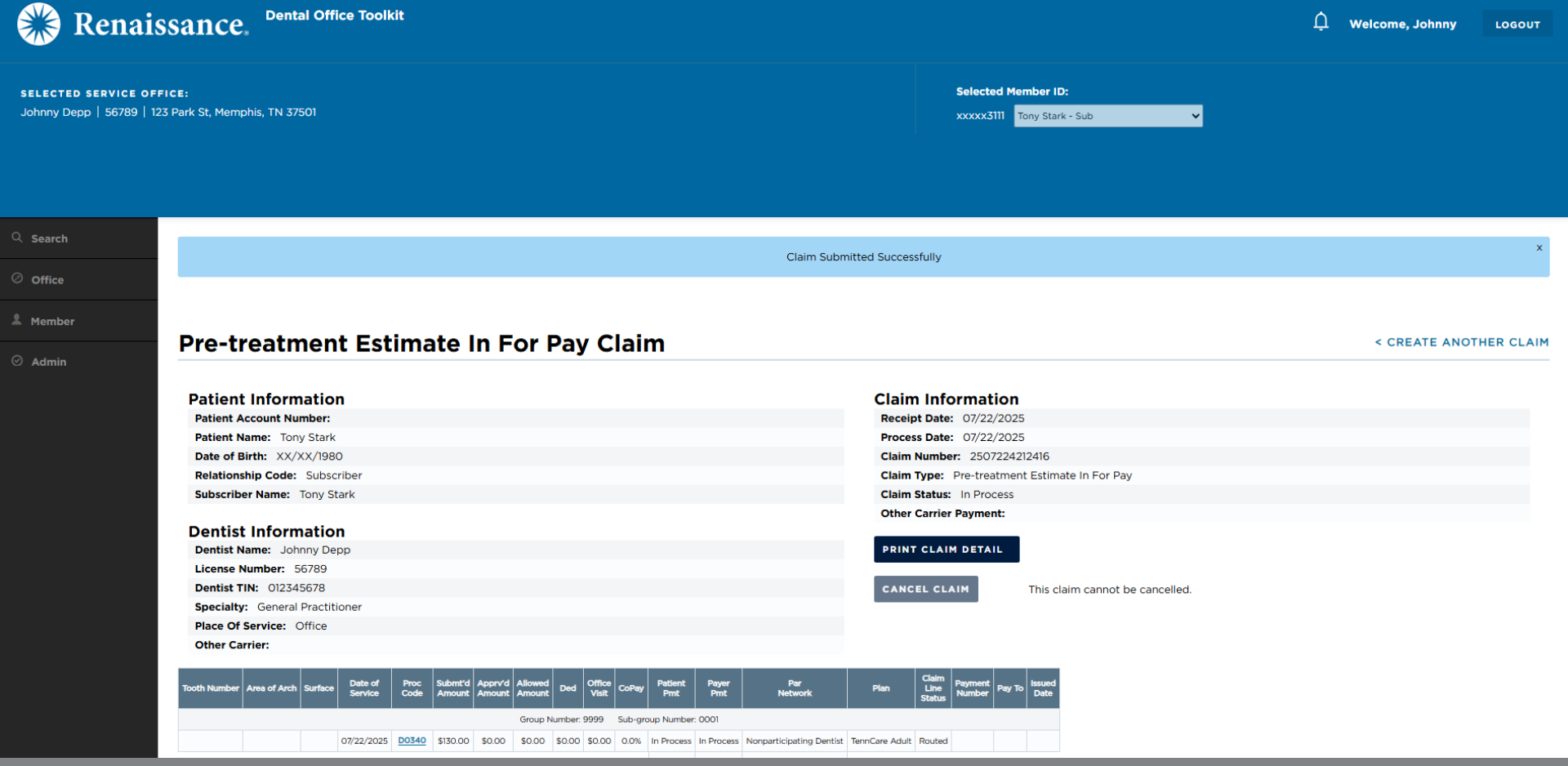
1. Navigate to the “Pre-Treatment Estimates” tab of the Activity Log
2. Click on the number of the pre-treatment estimate to view it



3. Click “Submit for Payment”



4. Select a Date of Service and review the details of the pre-treatment estimate and scroll down
5. If COB does not apply, check the box “I do NOT have any COB Details to add to this claim,” and click “Submit Claim”

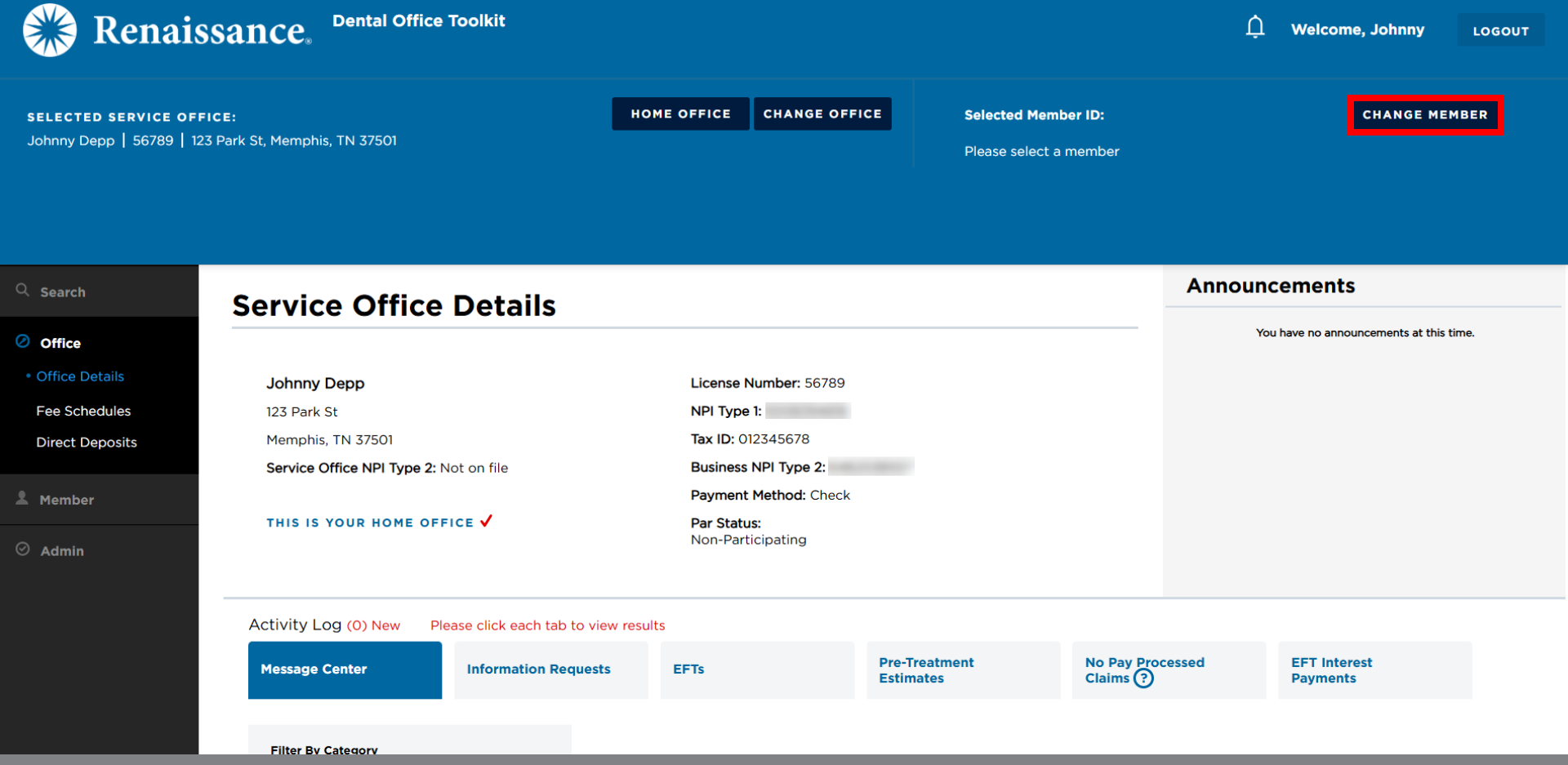


NOTE: This is what your screen should look like after submission. There is additional information on the Claim if you scroll down towards the bottom of the page

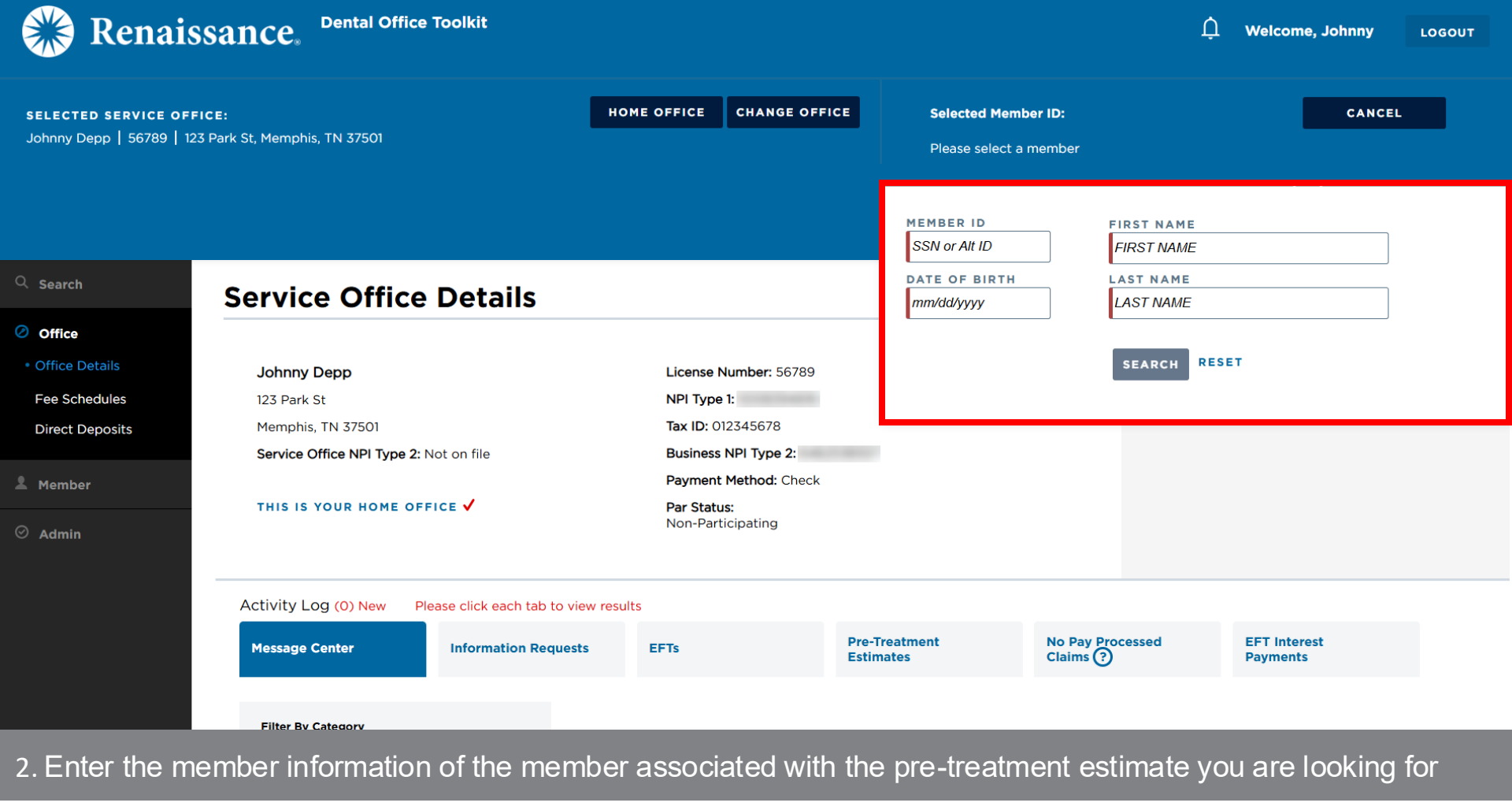
Renaissance®

Convert a Pre-treatment Estimate to a Claim

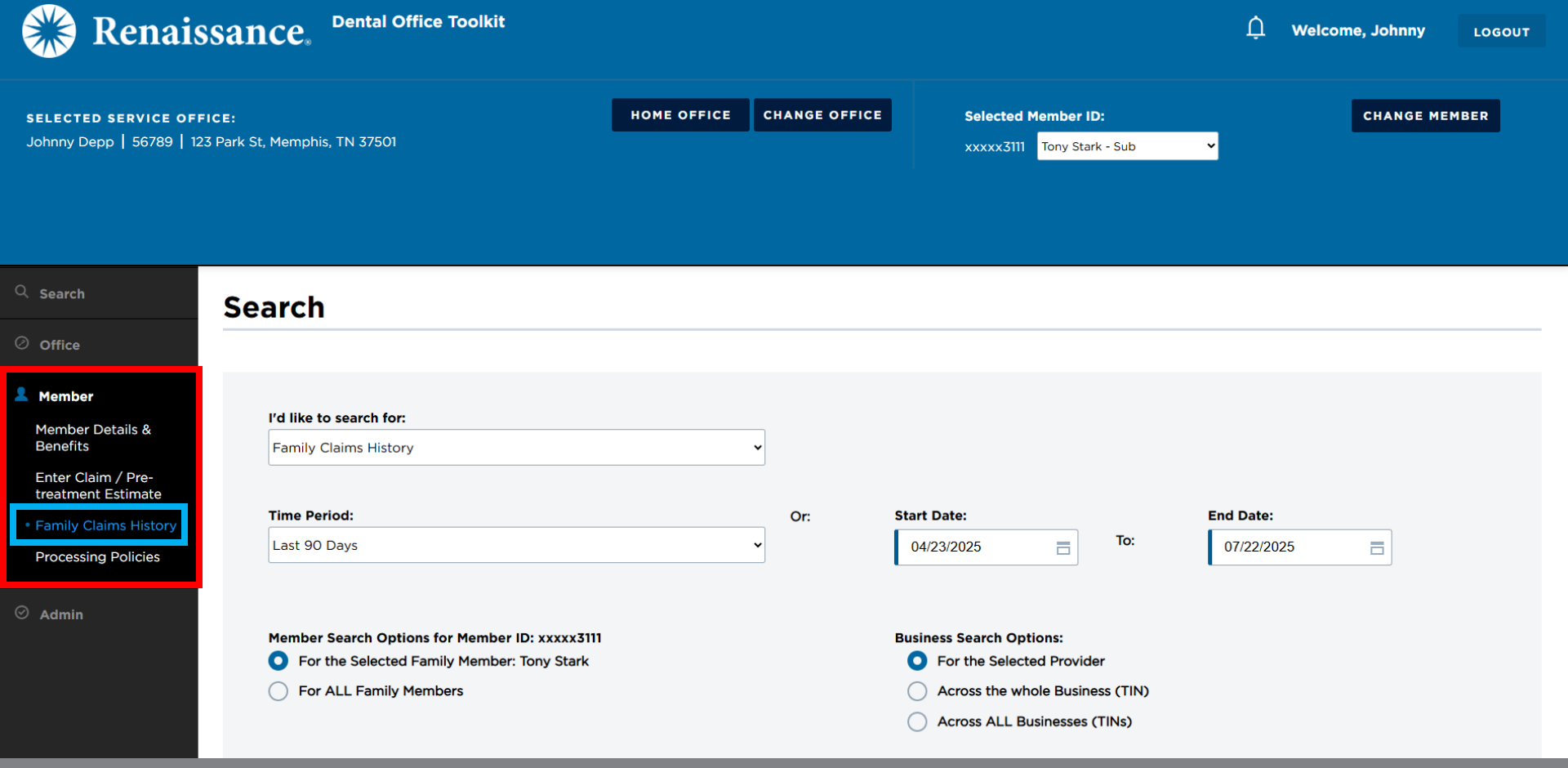
Option 2—By Searching for the Pre-treatment Estimate



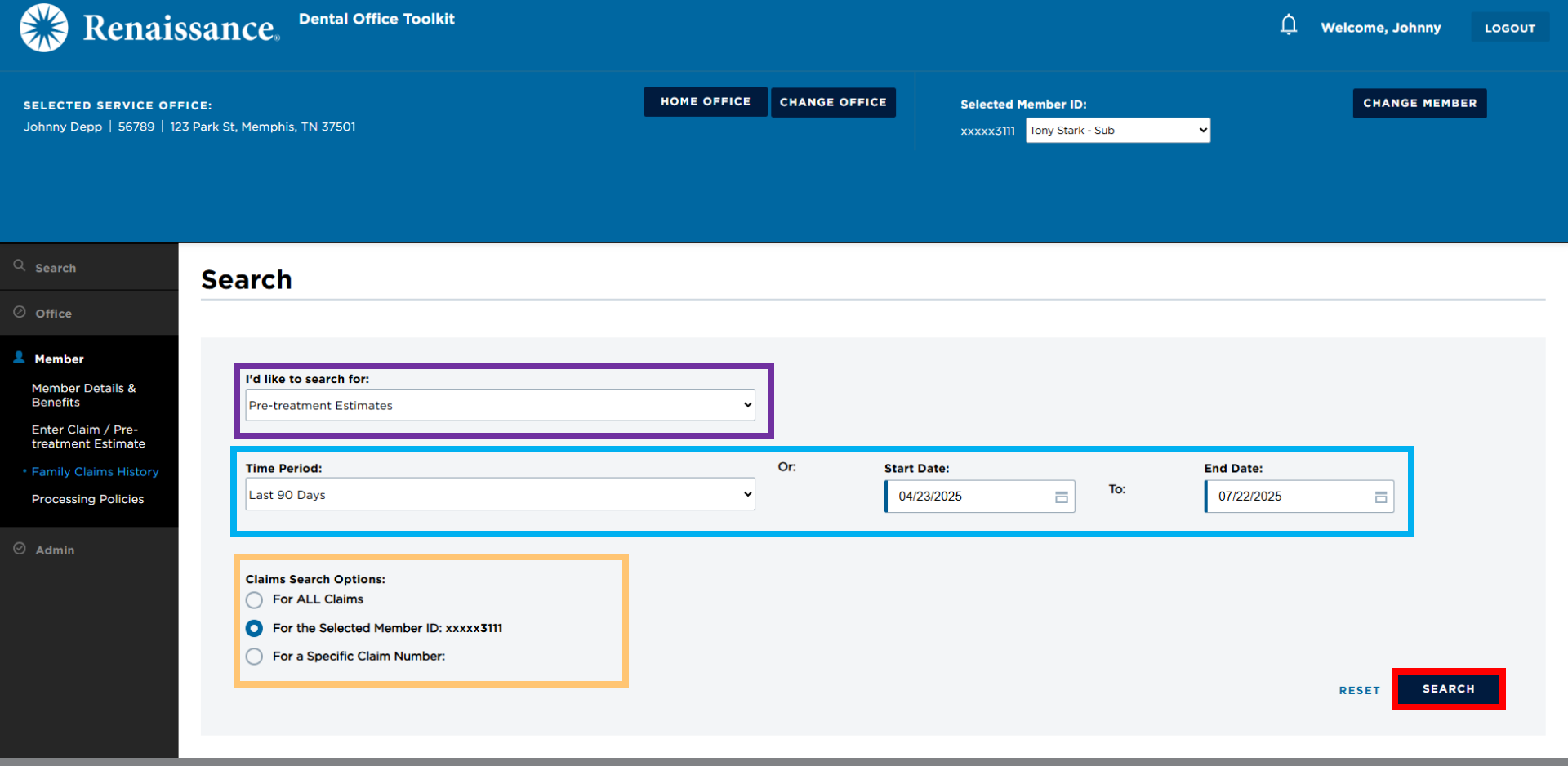
1. Click on “Change Member” to pull up the member associated with the pre-treatment estimate you are looking for



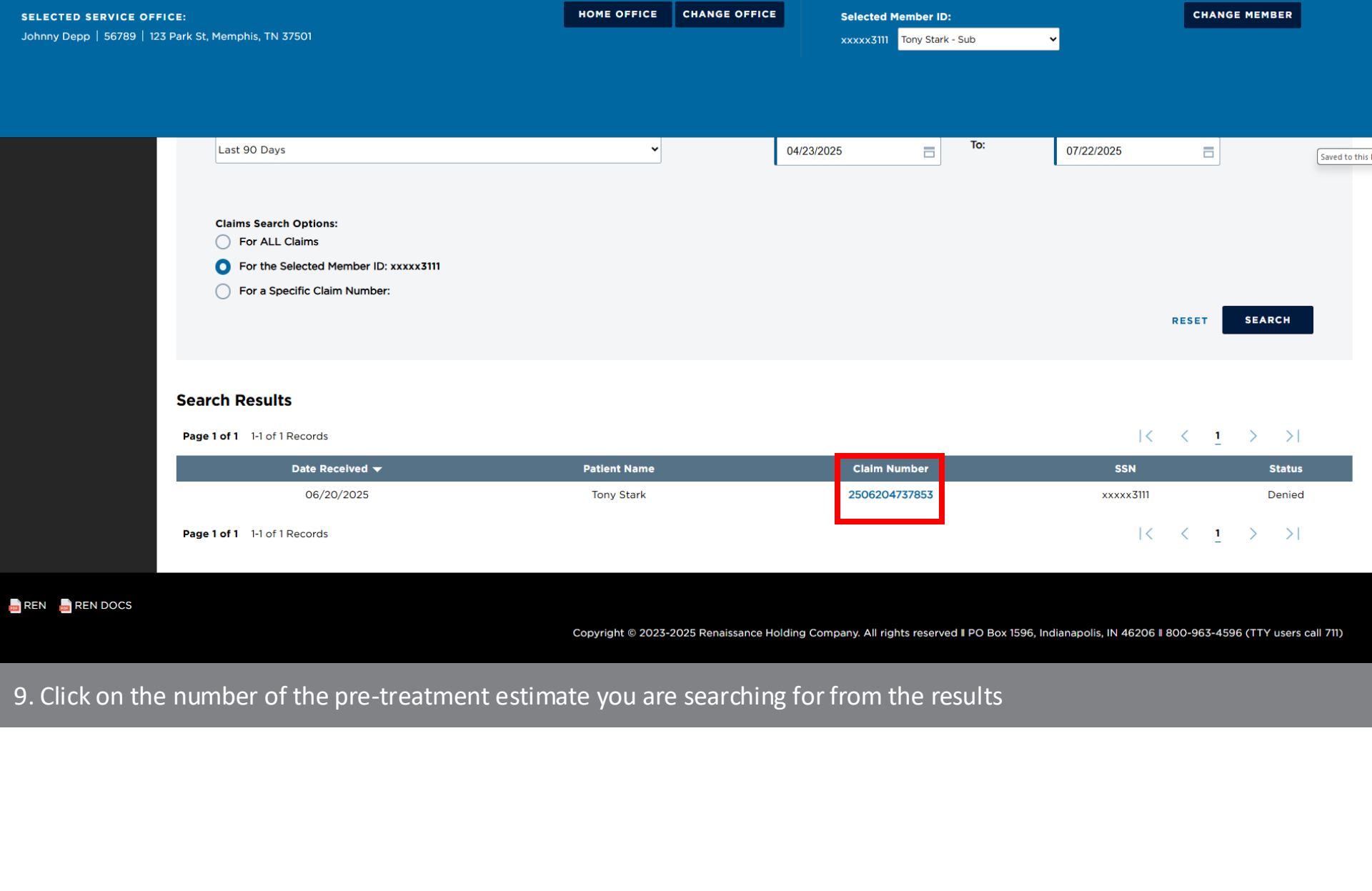
2. Enter the member information of the member associated with the pre-treatment estimate you are looking for



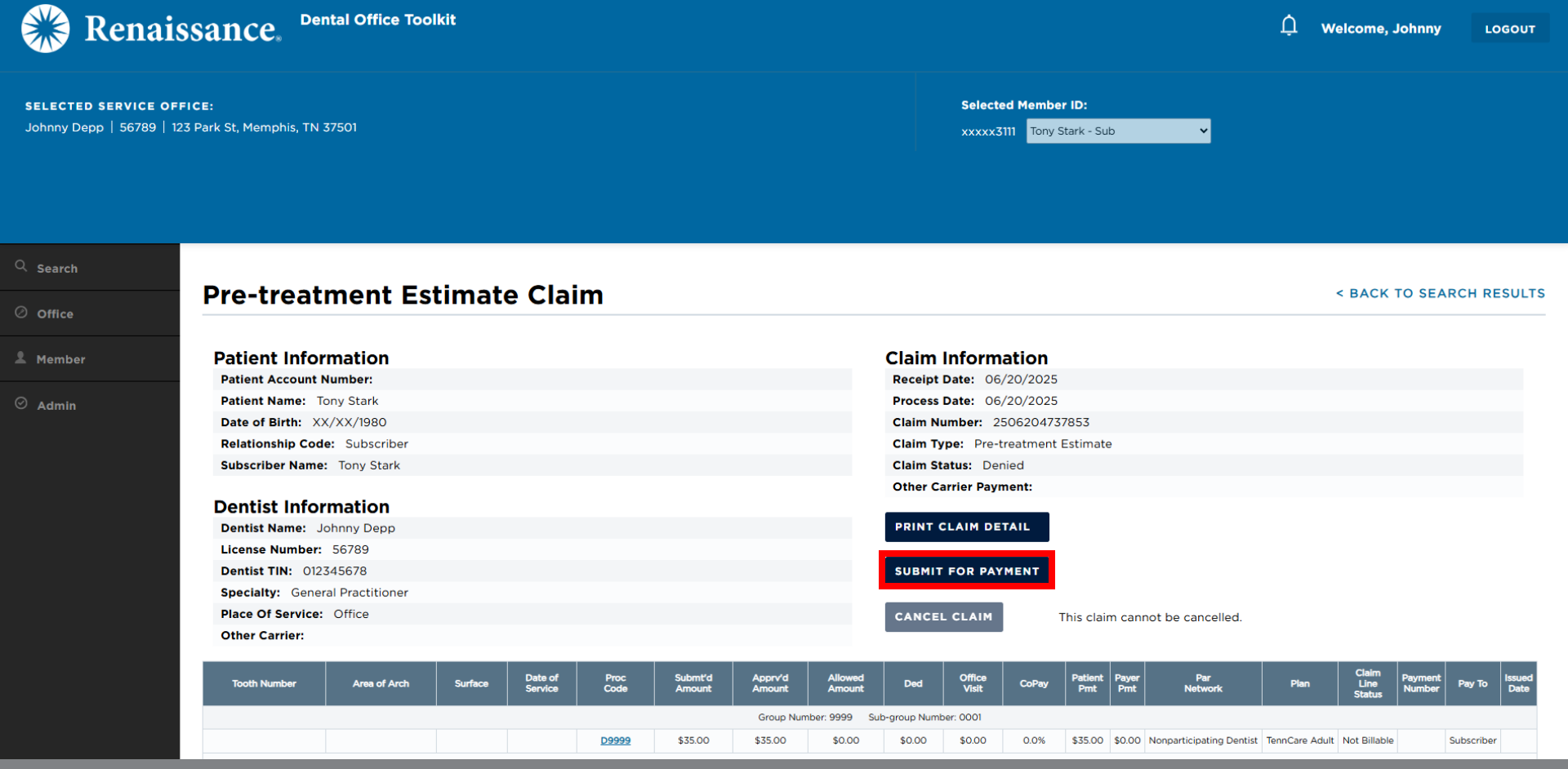
3. Navigate to the "Member" tab
4. Click on "Family Claims History"



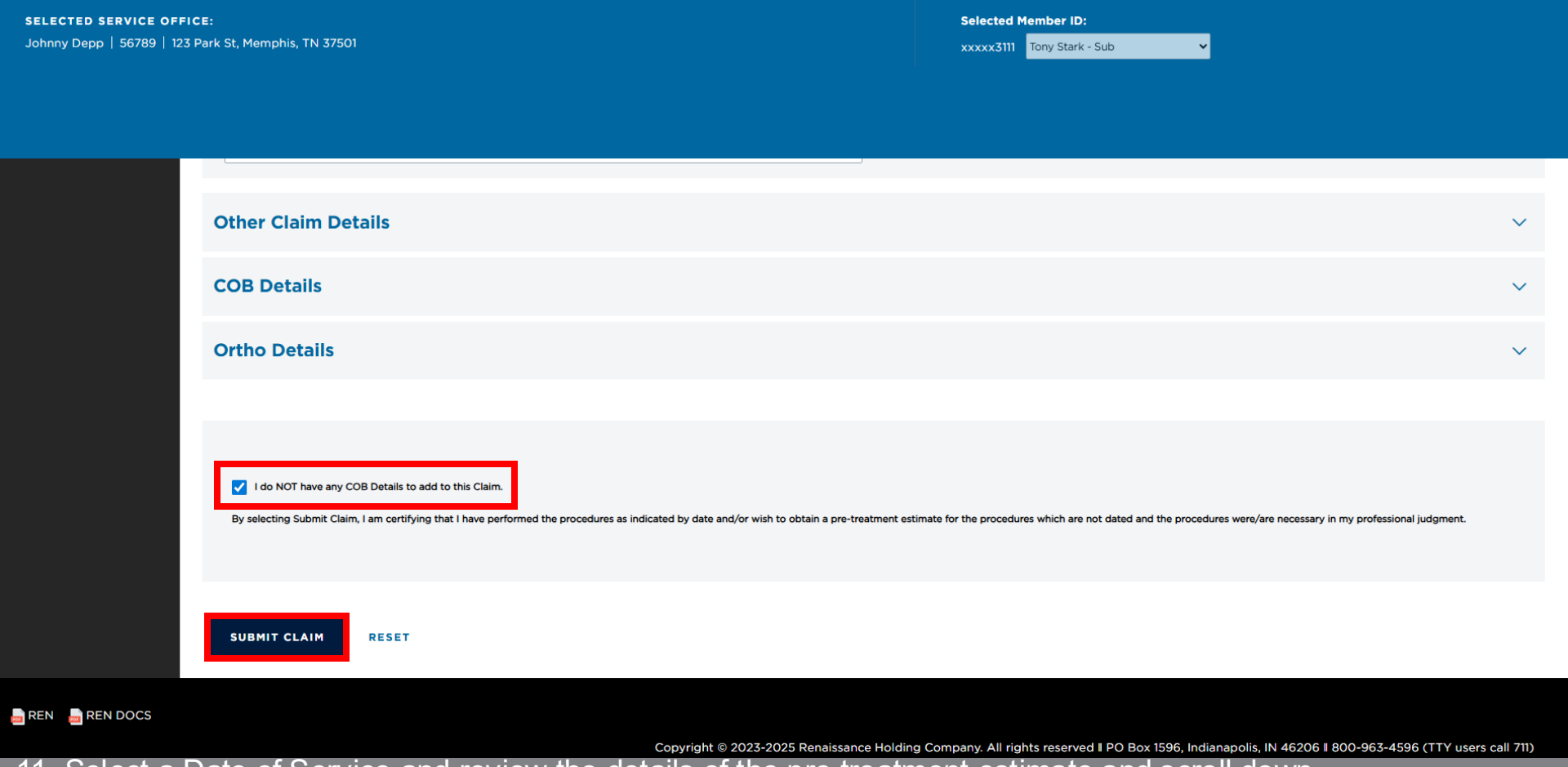
5. Select "Pre-treatment Estimates" from the "I'd like to search for:" drop down menu
6. Specify the time period you'd like to search inside
7. Select to search for all claims, just those for the member you have selected, or for a specific claim number
8. Click "Search"



9. Click on the number of the pre-treatment estimate you are searching for from the results



10. Click on “Submit for Payment”

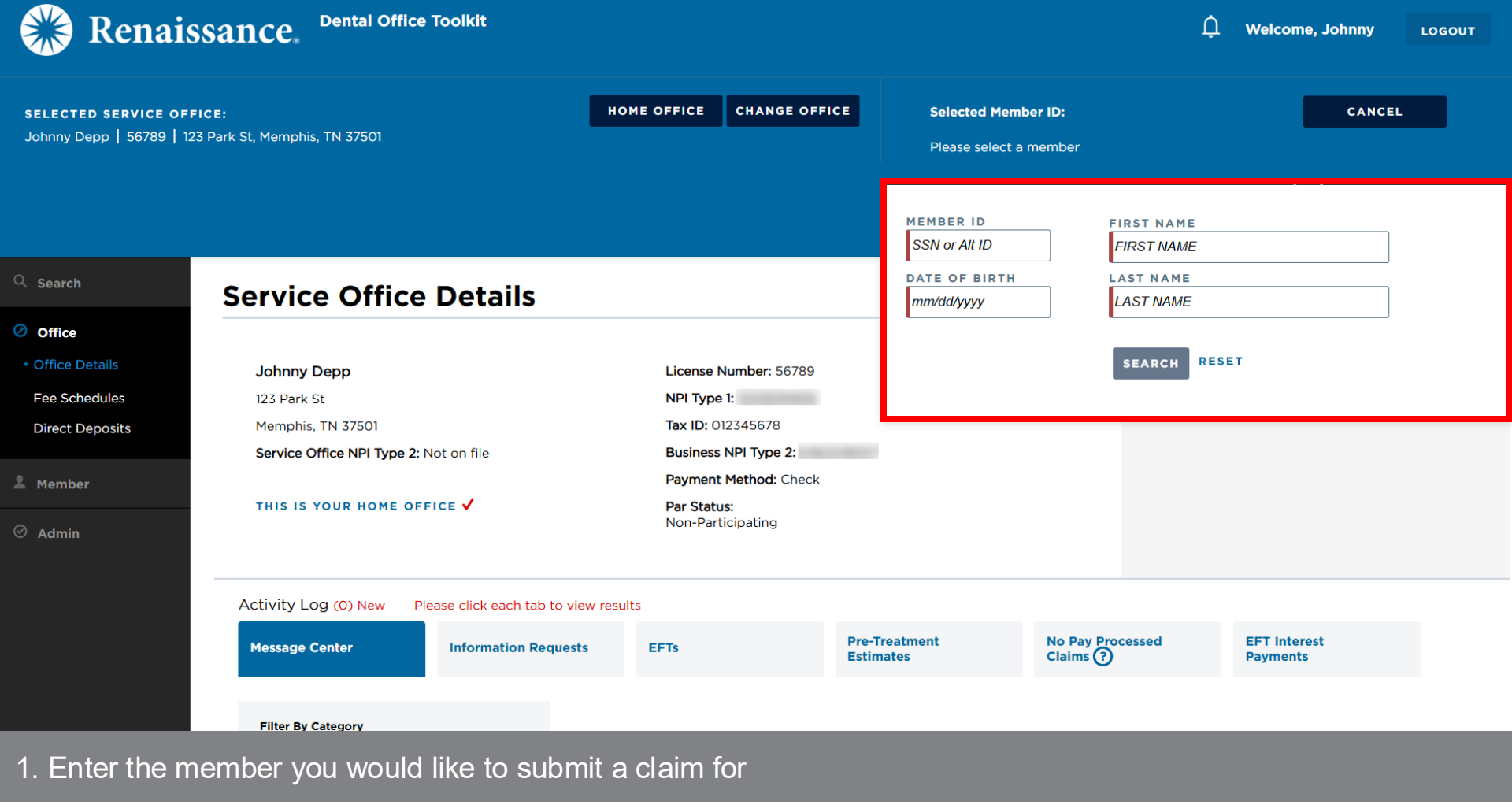


11. Select a Date of Service and review the details of the pre-treatment estimate and scroll down
12. If COB does not apply, check the box “I do NOT have any COB Details to add to this claim,” and click “Submit Claim”

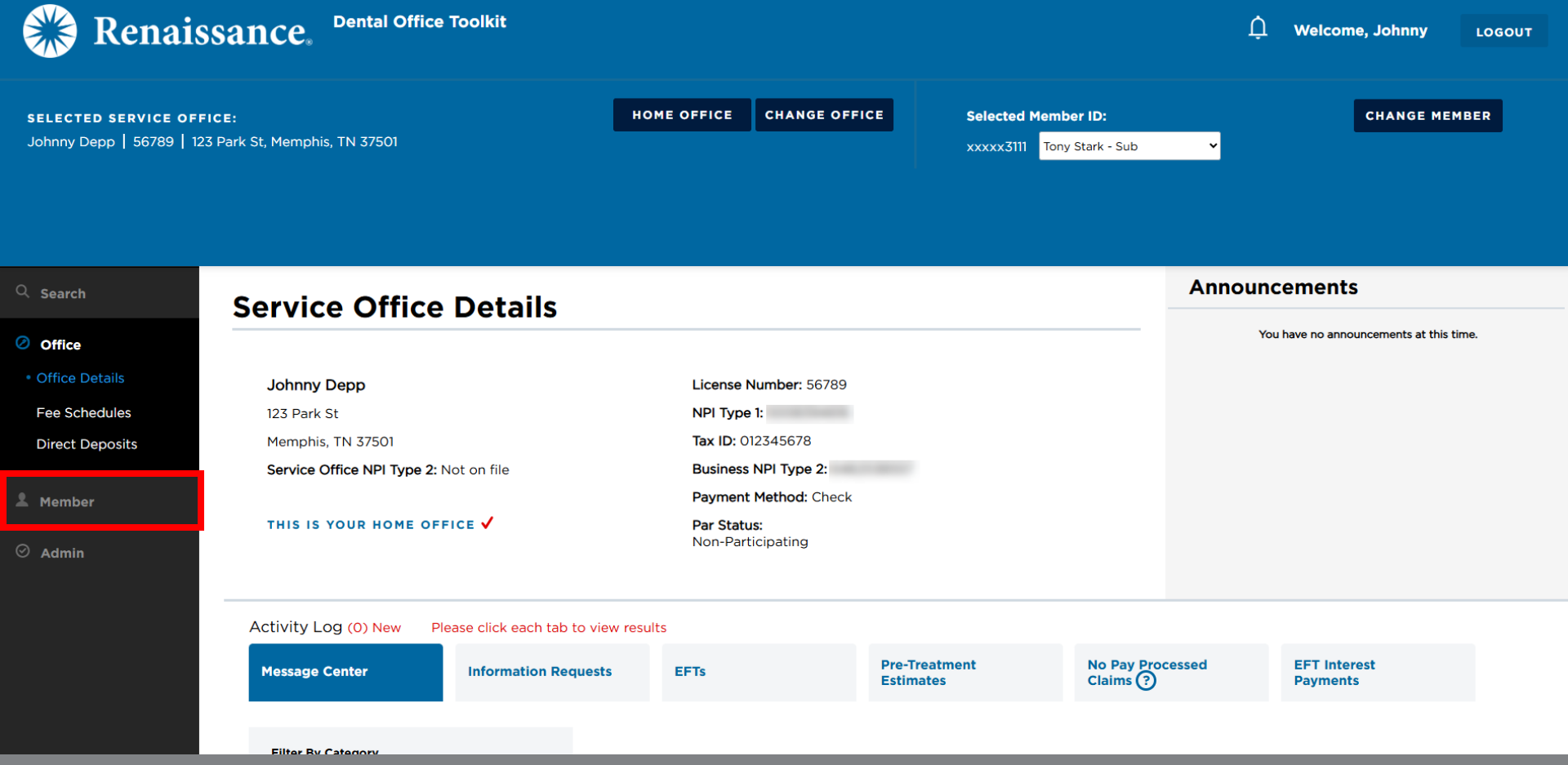
Renaissance®

Submit a Claim

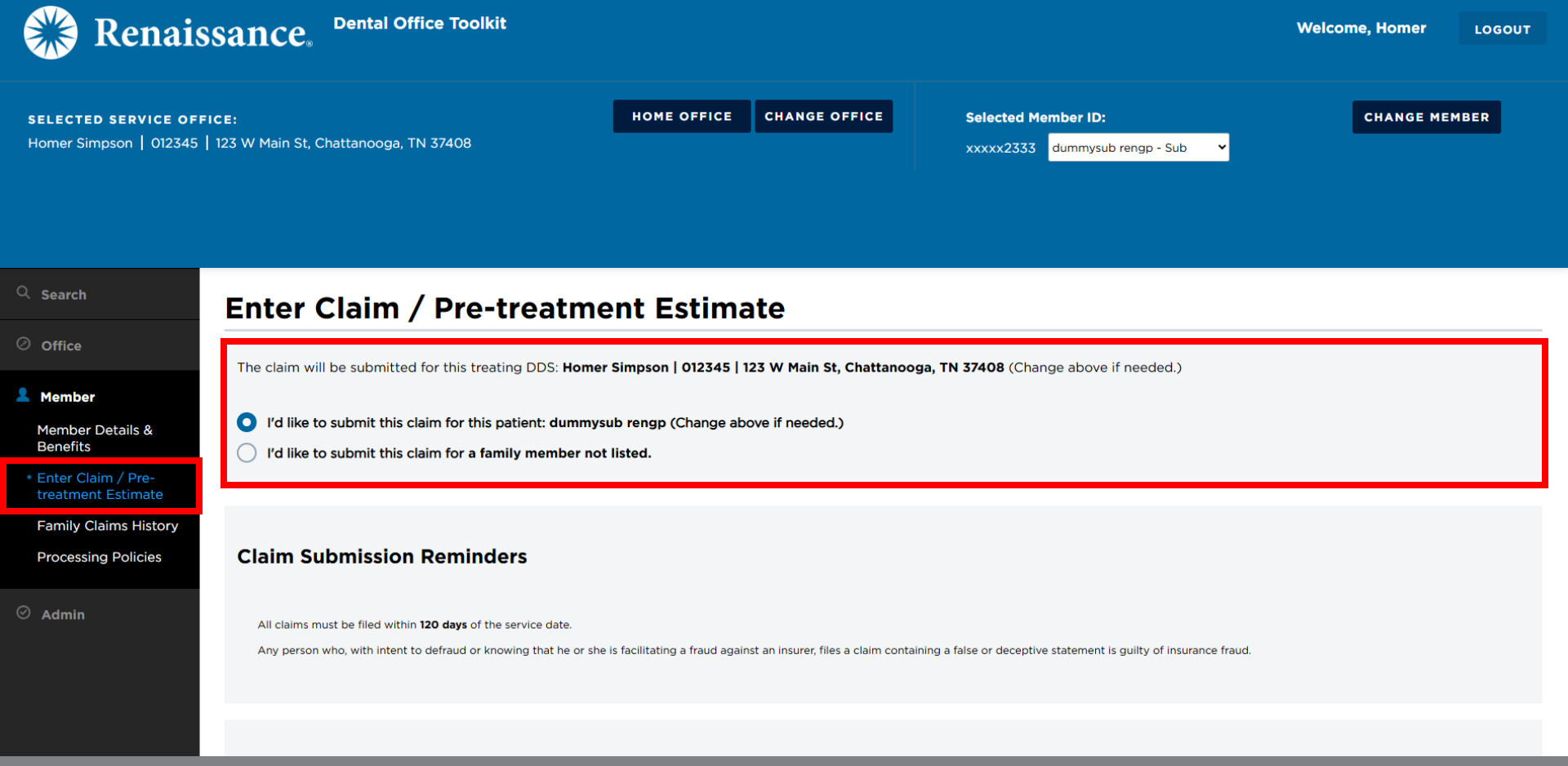
Use Case 1—Submit a Single Claim



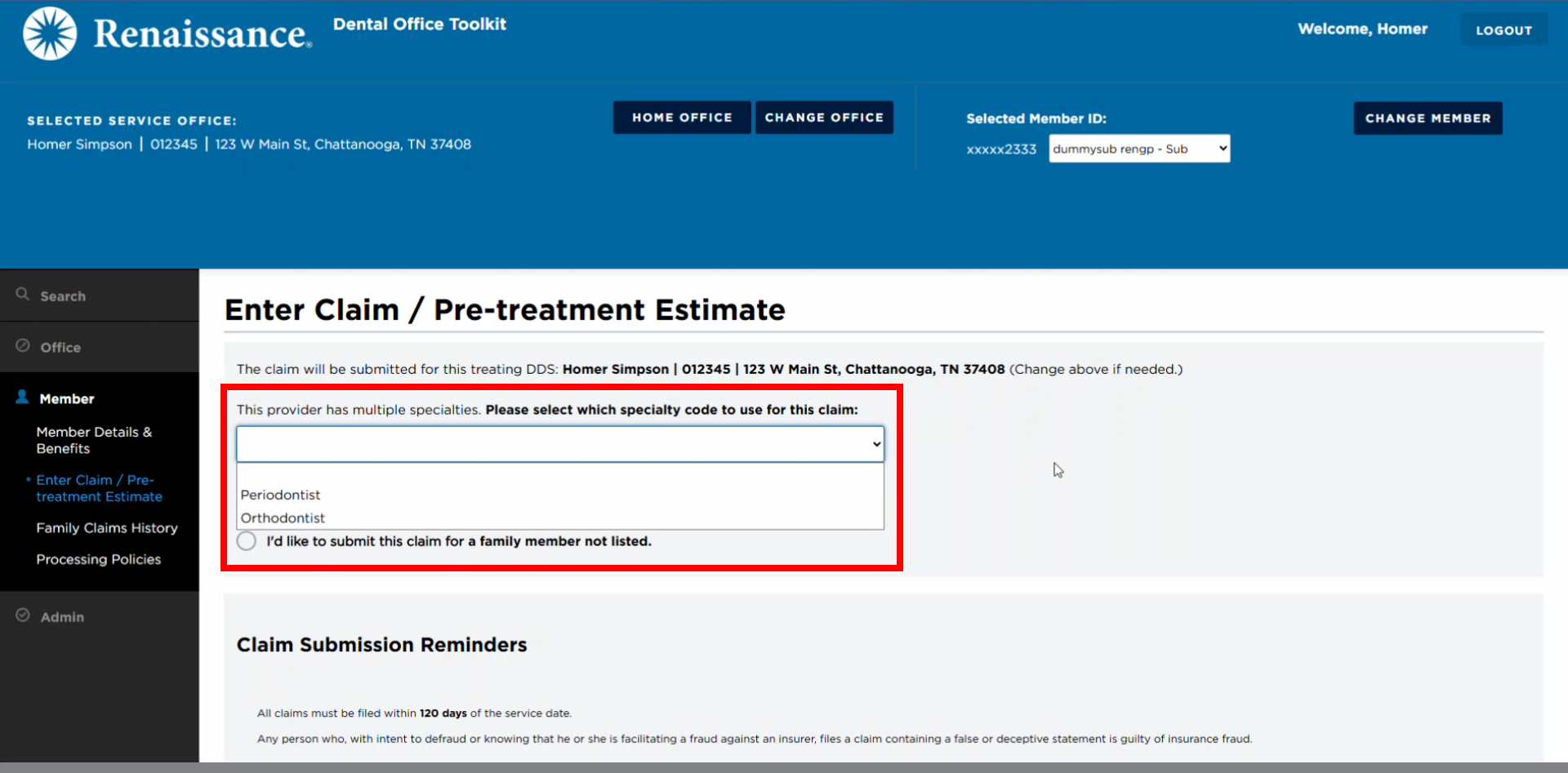
1. Enter the member you would like to submit a claim for



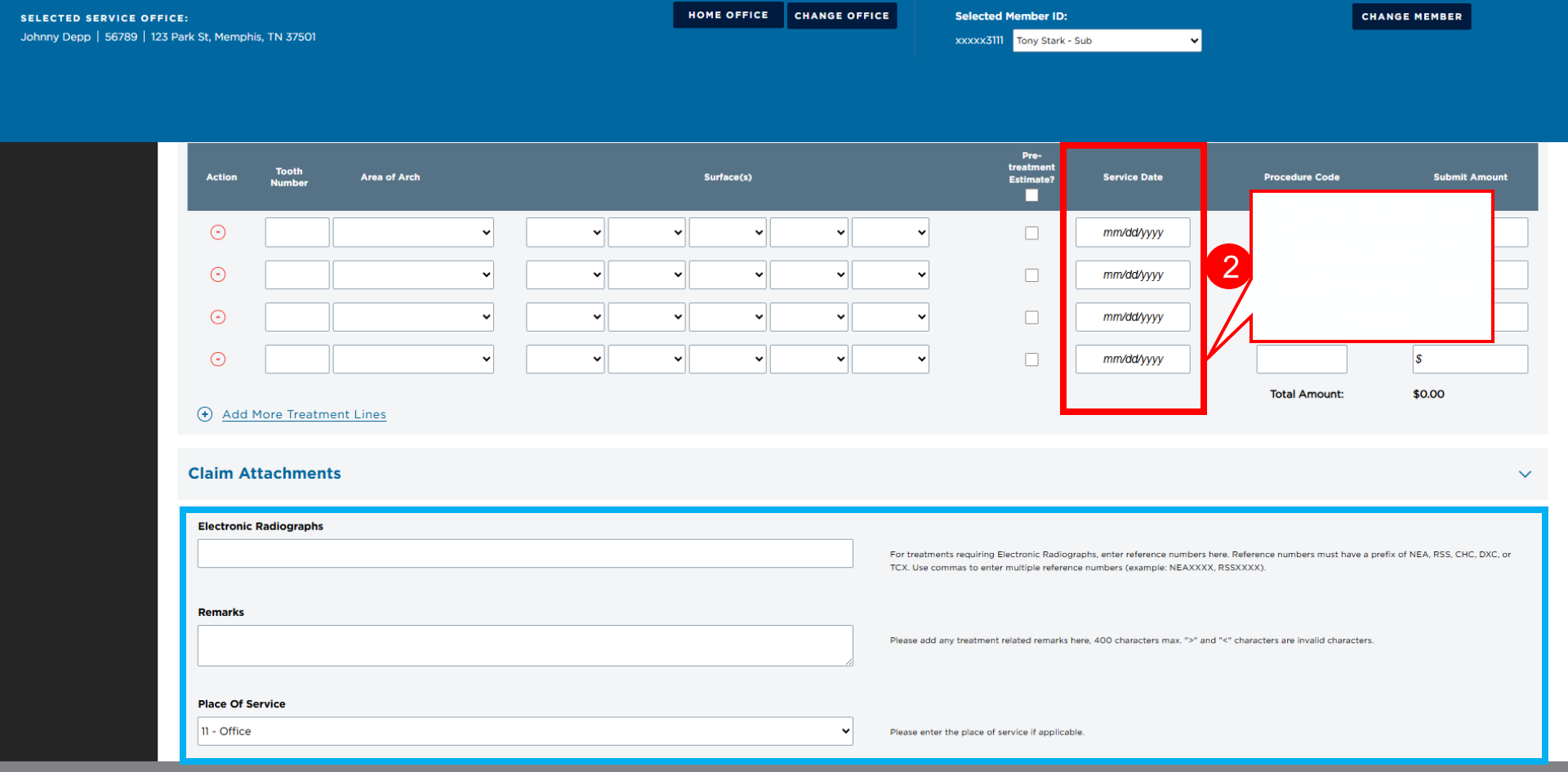
2. Once the member has been selected, click on the “Member” tab on the left-hand navigation bar



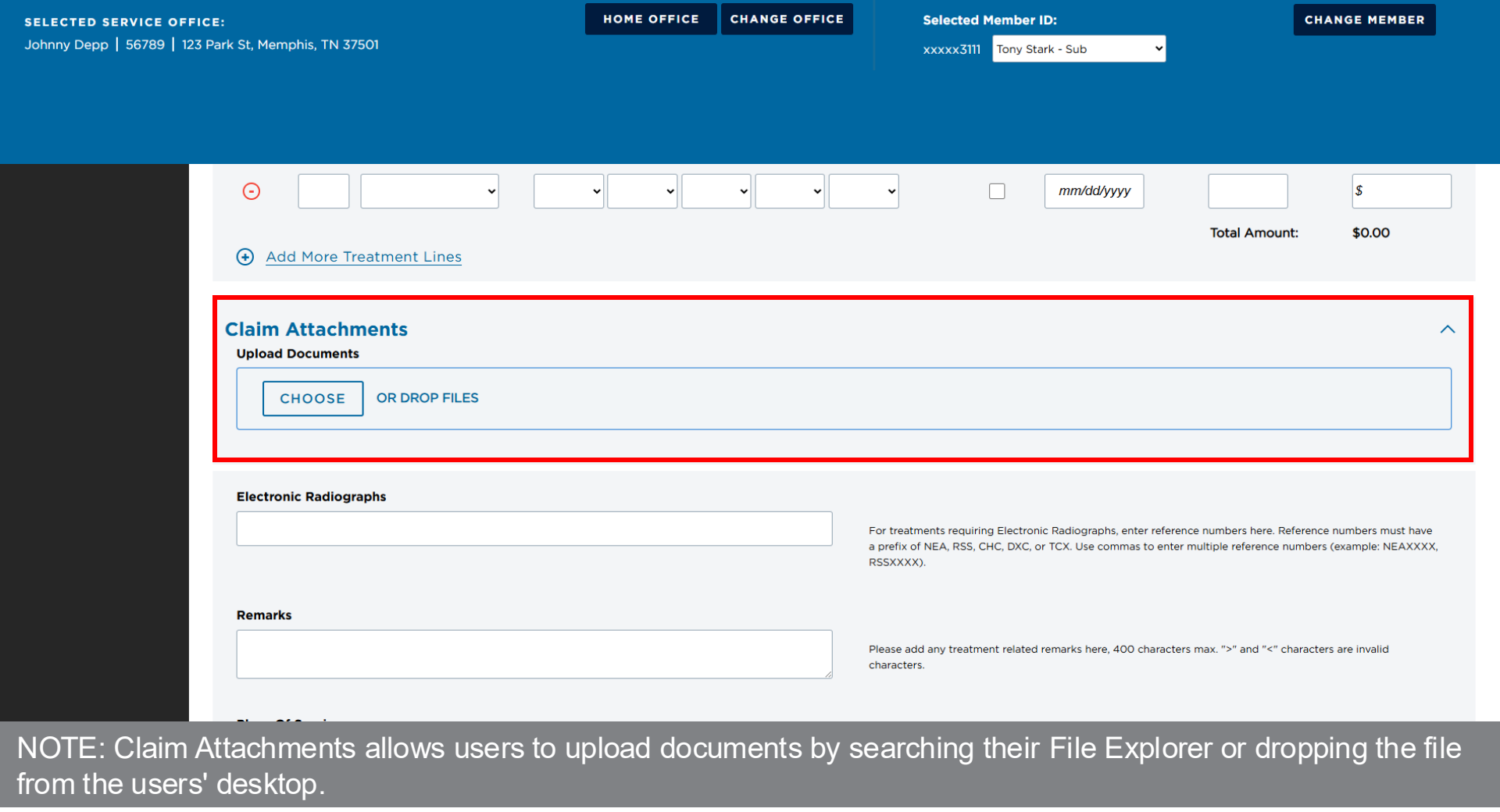
3. Click on “Enter Claim/Pre-treatment Estimate” on the left-hand navigation bar
4. Select the member you would like to submit the claim for



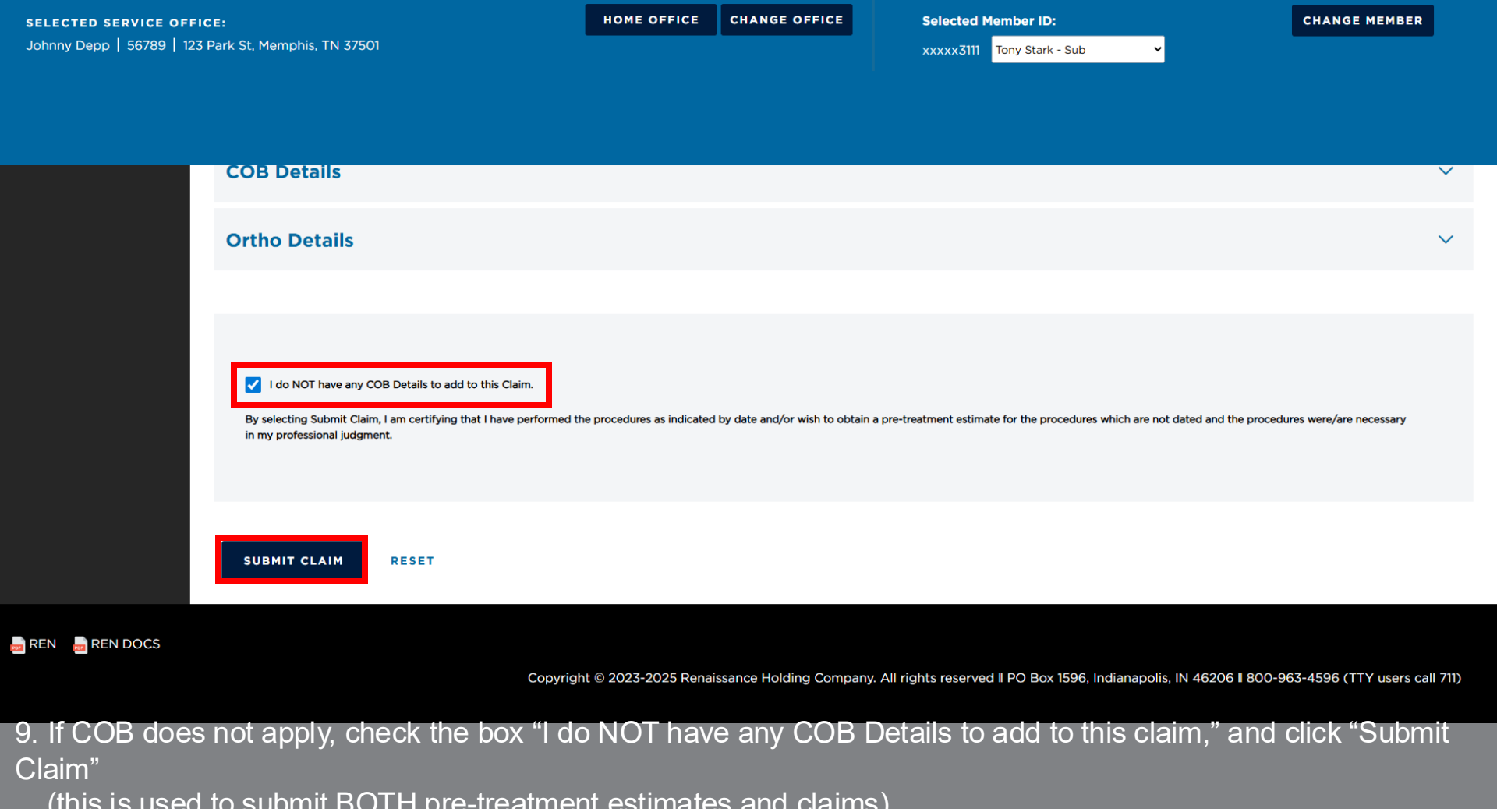
NOTE: When submitting a claim or PTE for a Dentist with multiple specialties, please select the specialty code to use for a claim



5. Enter the “Tooth Number,” “Area of Arch,” and “Surfaces” fields
6. “Service Date” box MUST be completed in order to submit claim
7. Enter “Procedure Code” and “Submit Amount” (repeat steps 5-7 if there are multiple treatment lines)
8. Fill in any additional claim details below if they are applicable to the claim you are entering



NOTE: Claim Attachments allows users to upload documents by searching their File Explorer or dropping the file from the users' desktop.

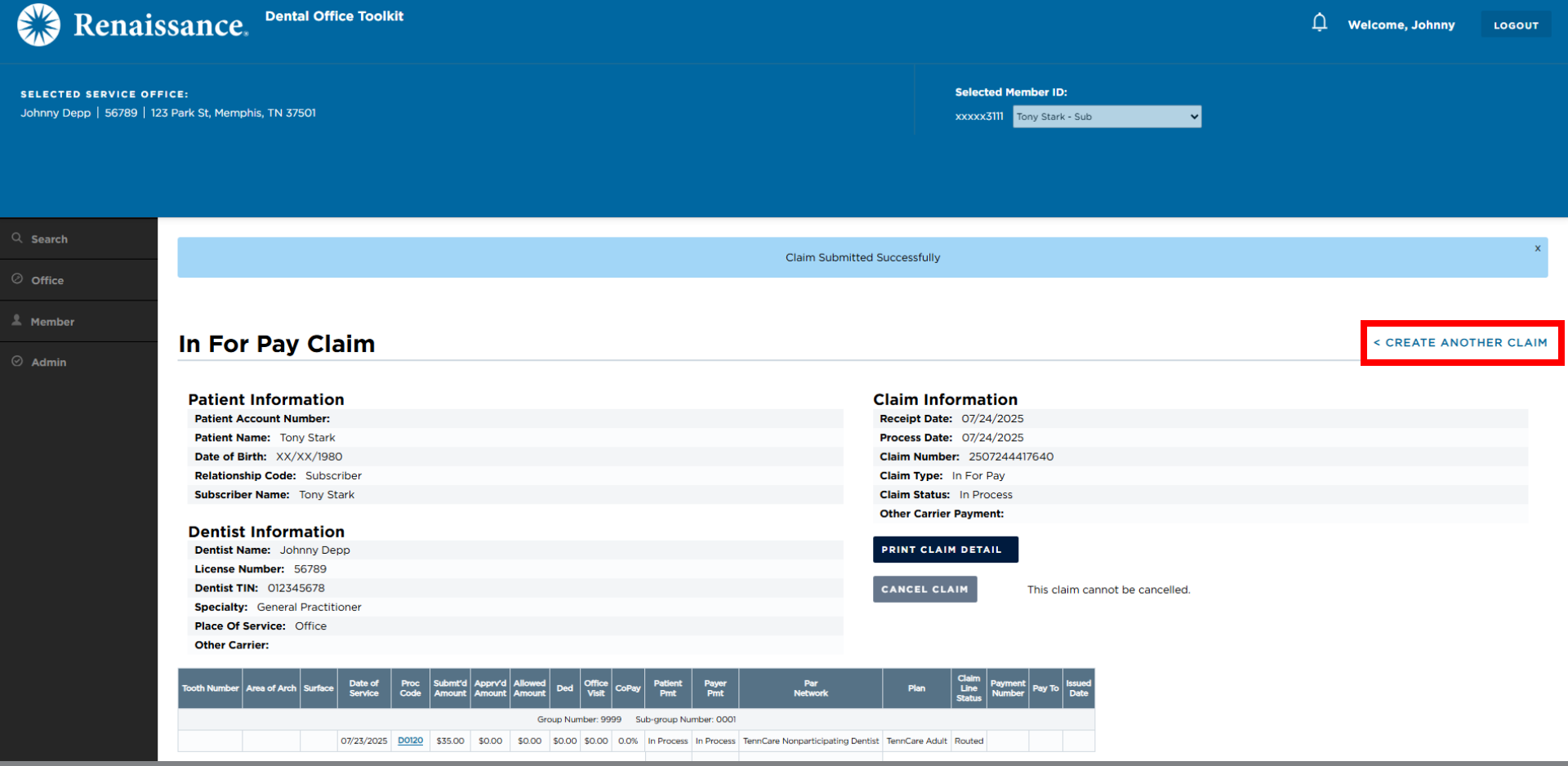


9. If COB does not apply, check the box “I do NOT have any COB Details to add to this claim,” and click “Submit Claim”
(this is used to submit BOTH pre-treatment estimates and claims)

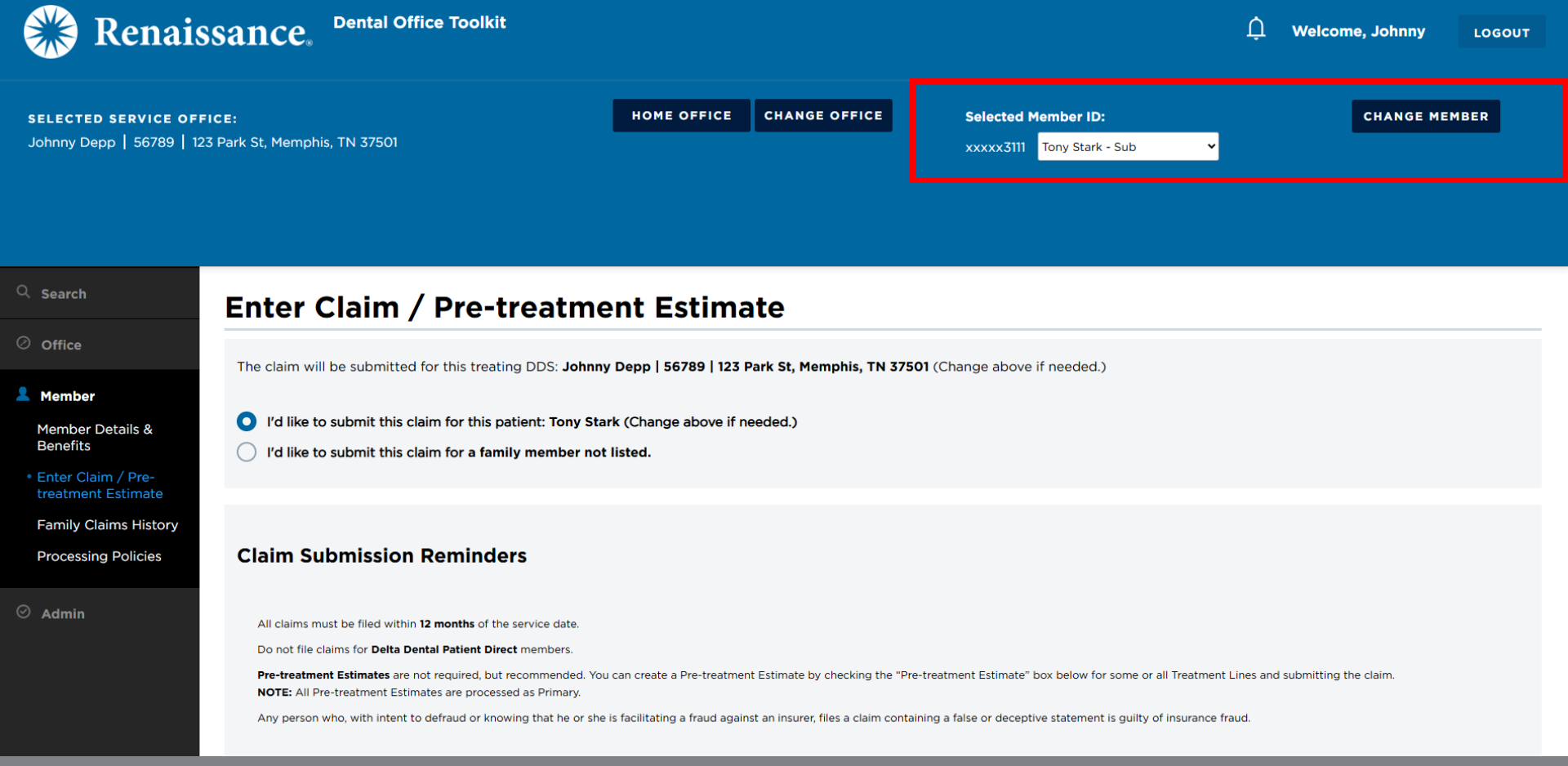
Renaissance®

Submit a Claim

Use Case 2—Submit a Series of Claims



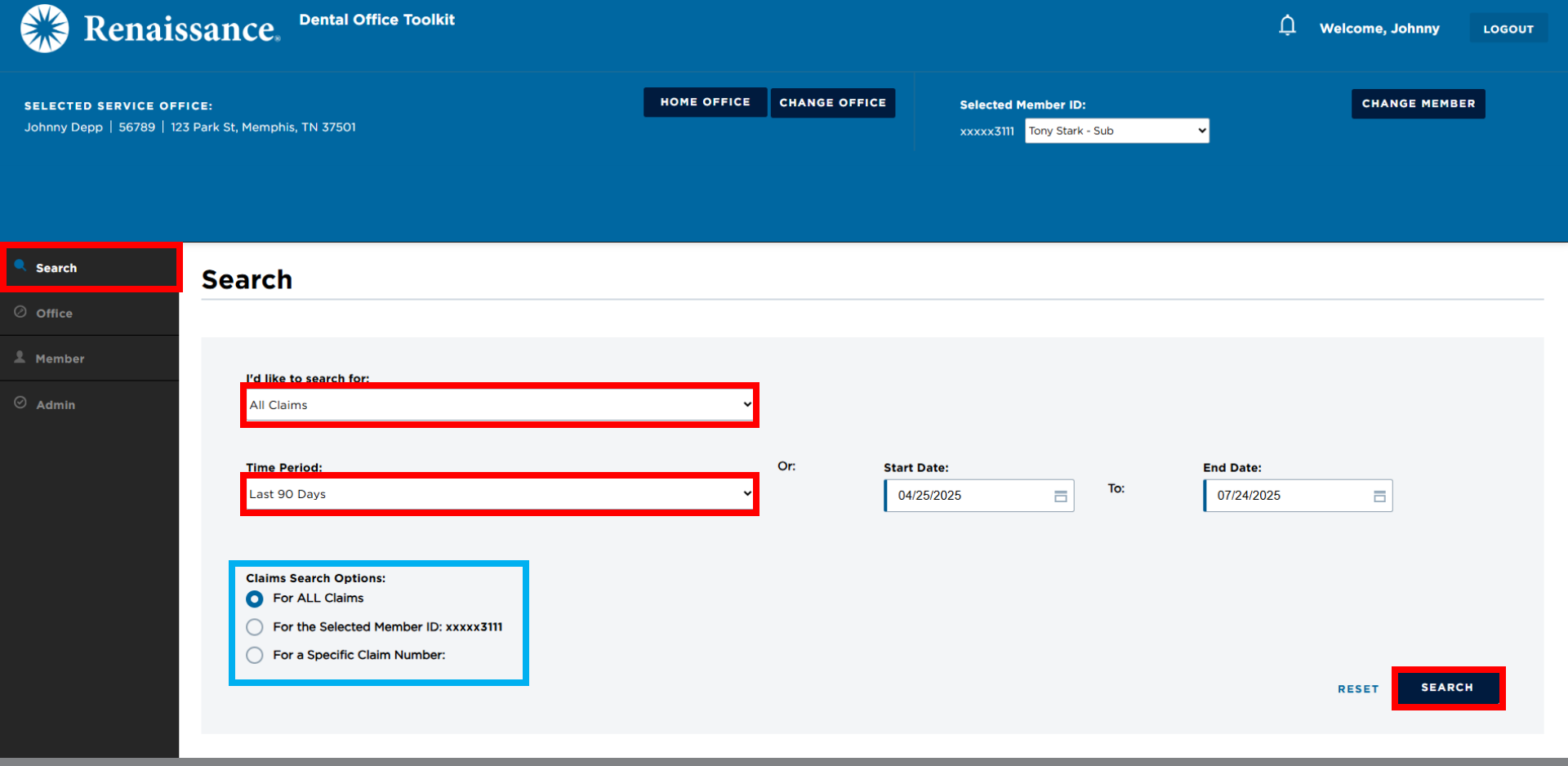
10. Review details of your submitted claim
11. To submit a series of claims for various members, click on “Create Another Claim”



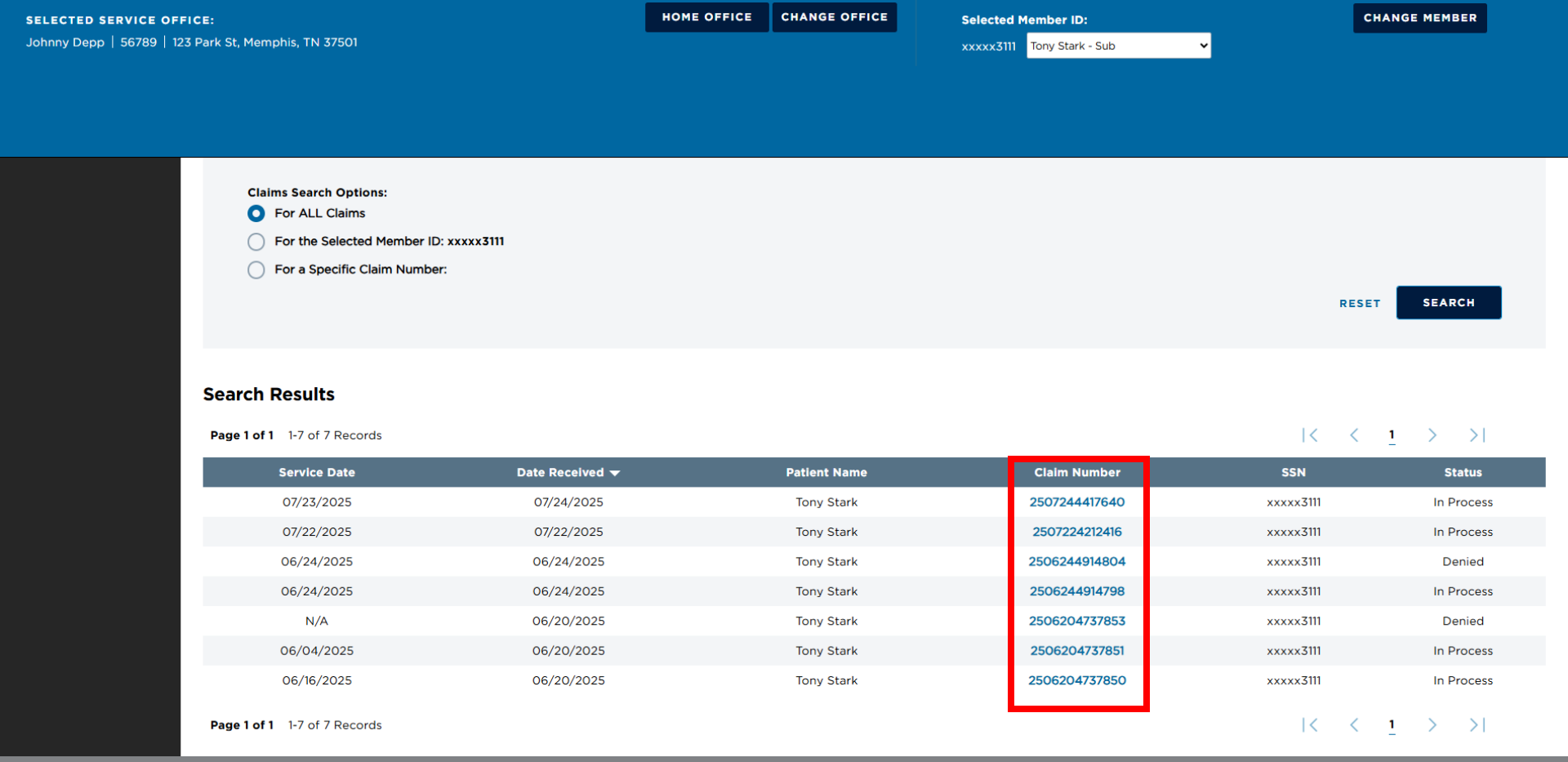
12. Enter a new member ID in the "Change Member" field to continue without leaving the claim submission page

Renaissance®

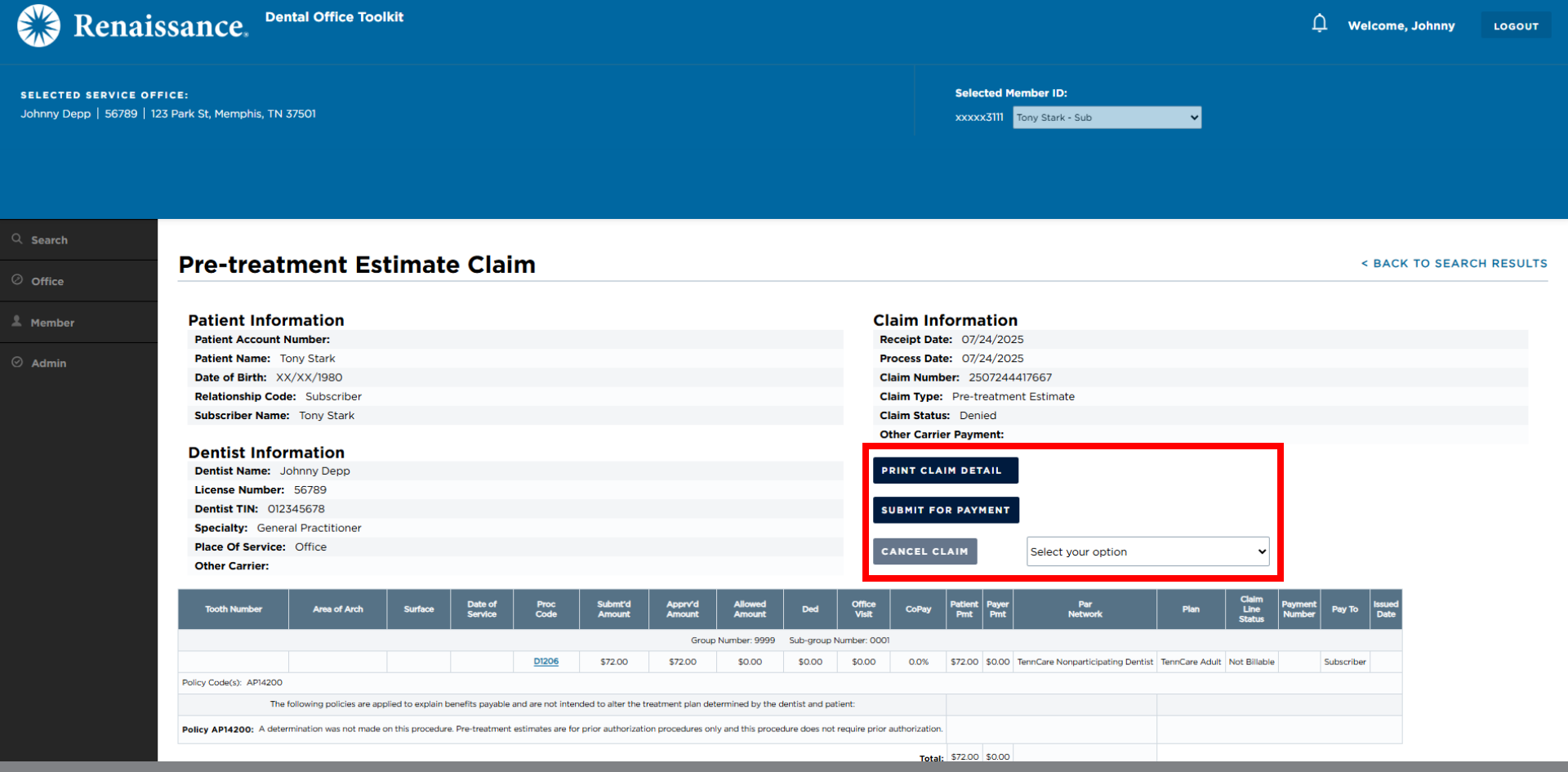
Search for a Claim



1. Click “Search” on left-hand navigation bar
2. Select your claim search options and time period or start/end date
3. Filter search results by all claims, selected member ID, or by specific claim number
4. Click the “Search” button in the bottom right corner



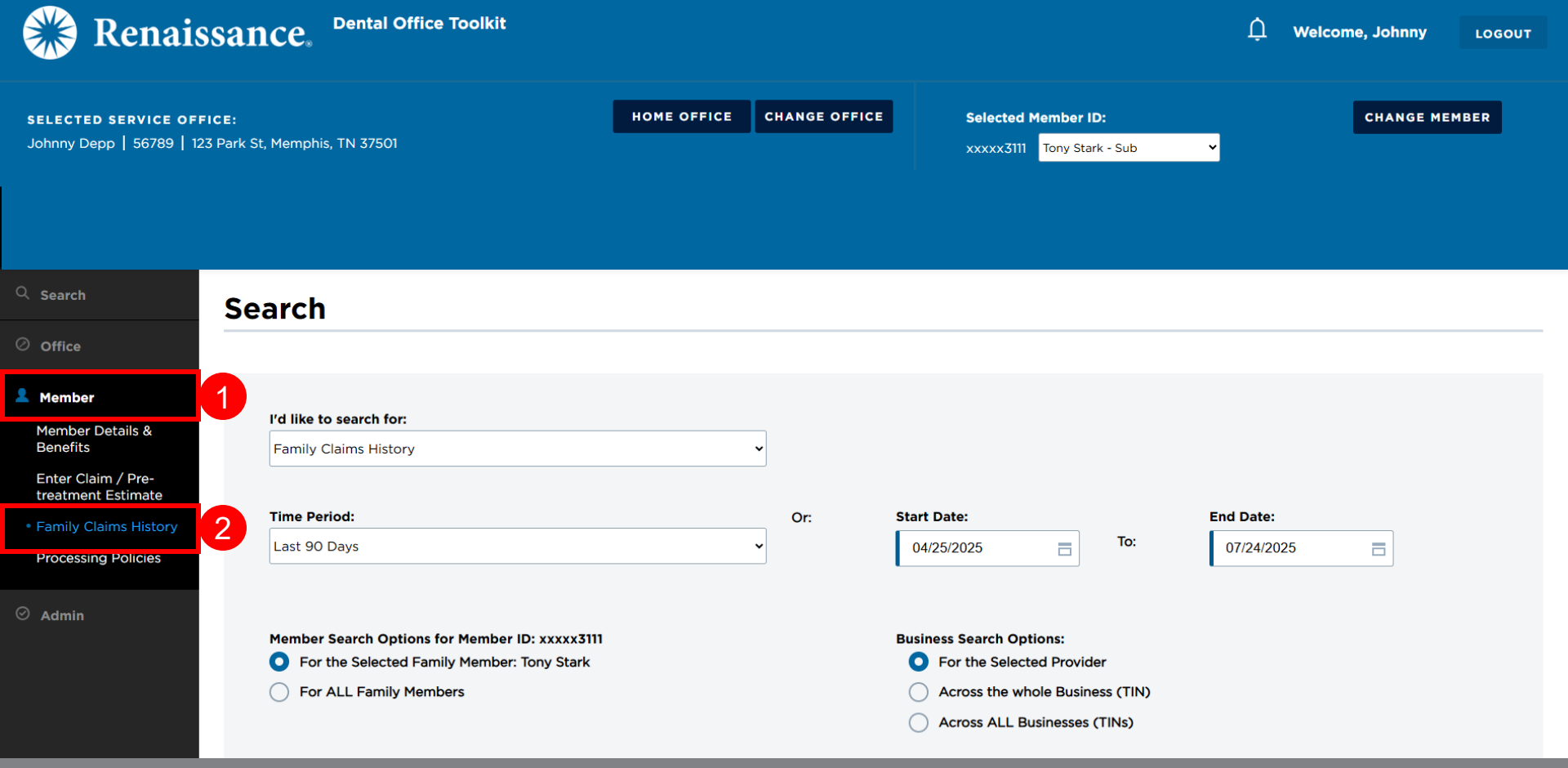
5. Once search results appear, click on any claim number to see a detailed breakdown of the claim



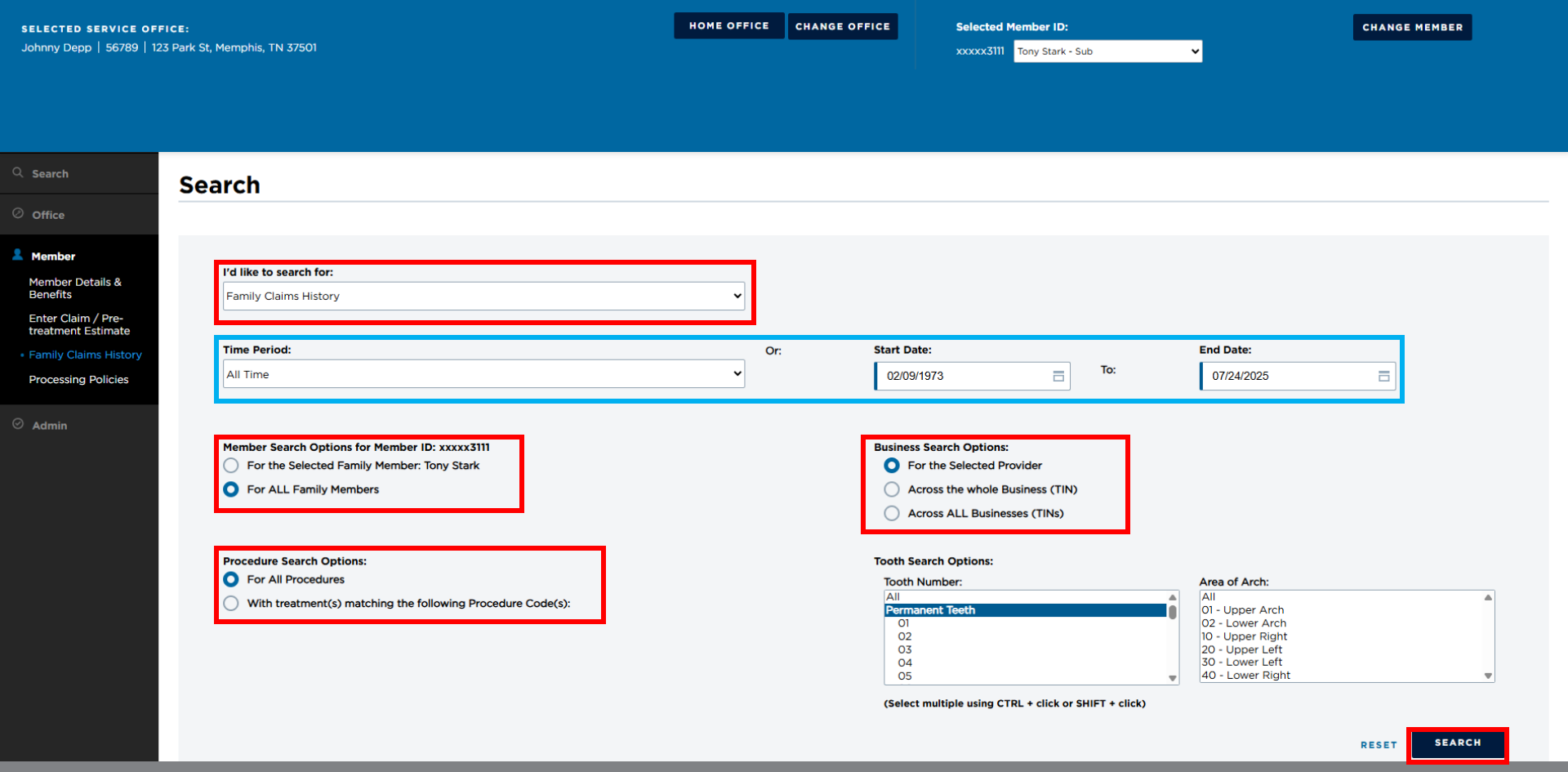
6. After clicking on a claim number, you can see the full details of the claim
7. There are options to “Print Claim Detail,” “Submit for Payment” (for PTEs), or "Cancel Claim" (see page 97)

Renaissance®

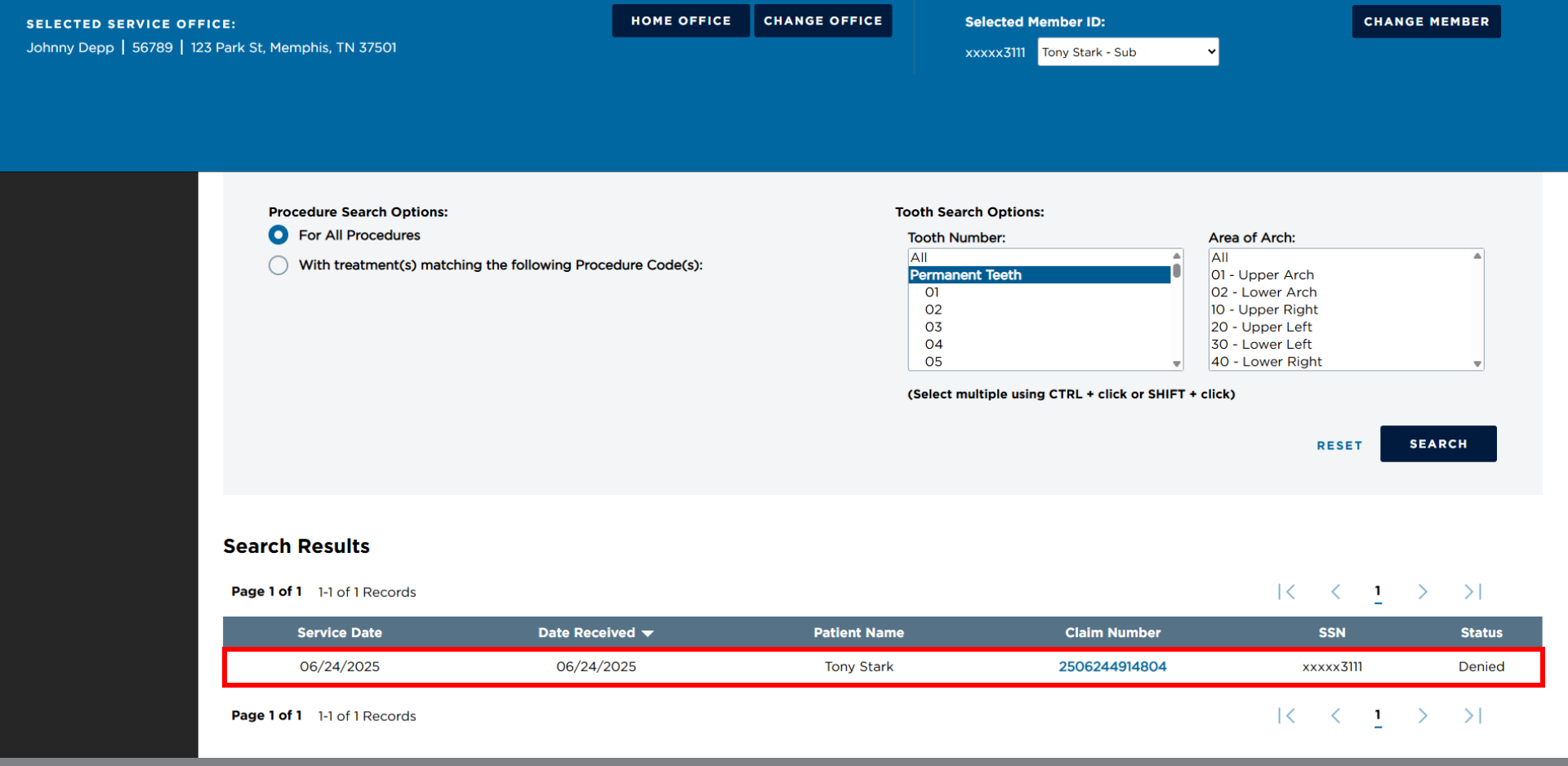
Search Family Claims History Across Businesses



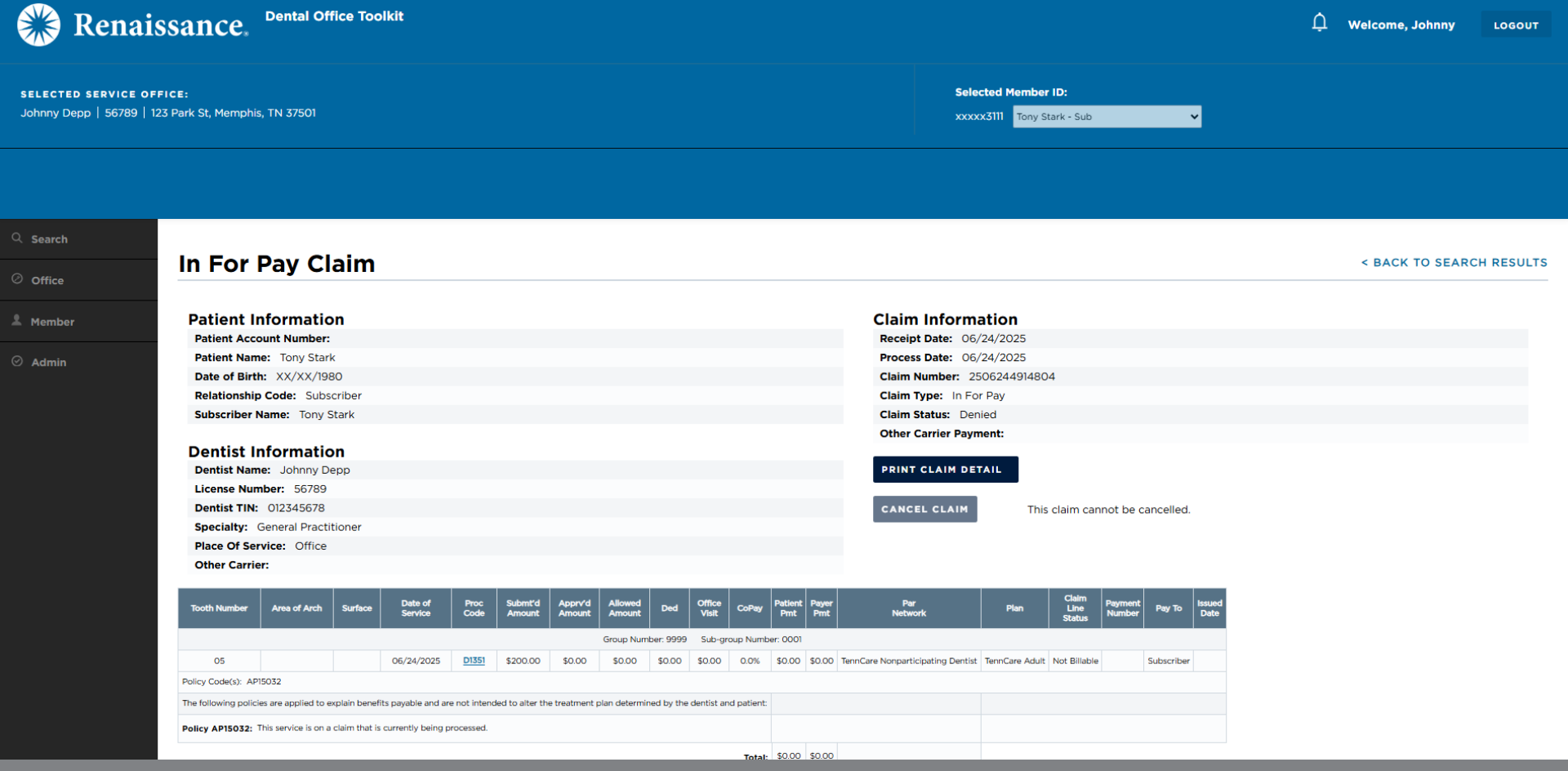
1. Navigate to the “Member” tab in the left-hand navigation bar
2. Click on “Family Claims History”



3. Fill out and select the options outlined in **red**
4. Enter your desired time period and start/end dates outlined in **blue**, and click "Search"



5. View search results
6. Click on any claim number for details



7. View claim details

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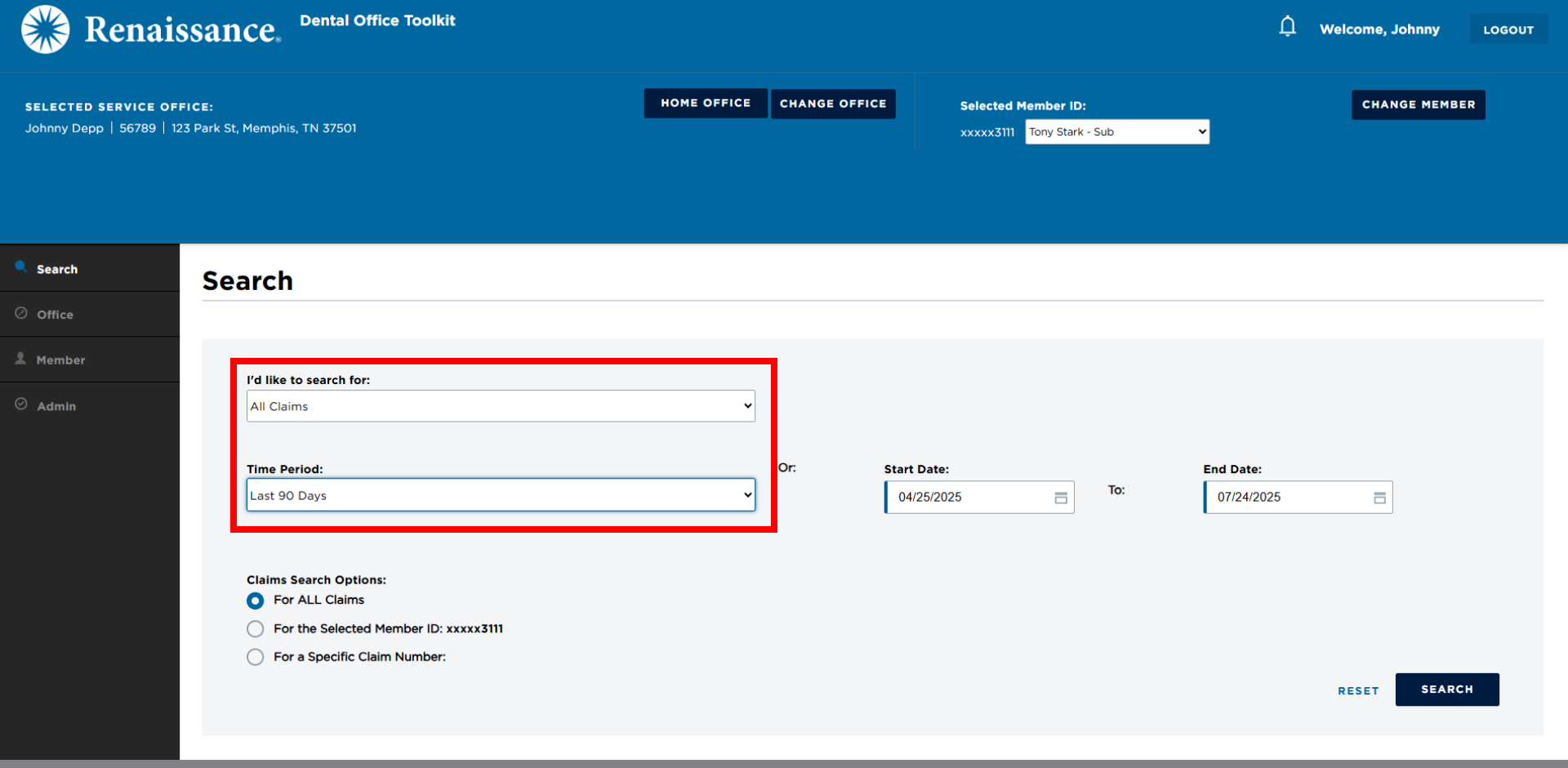
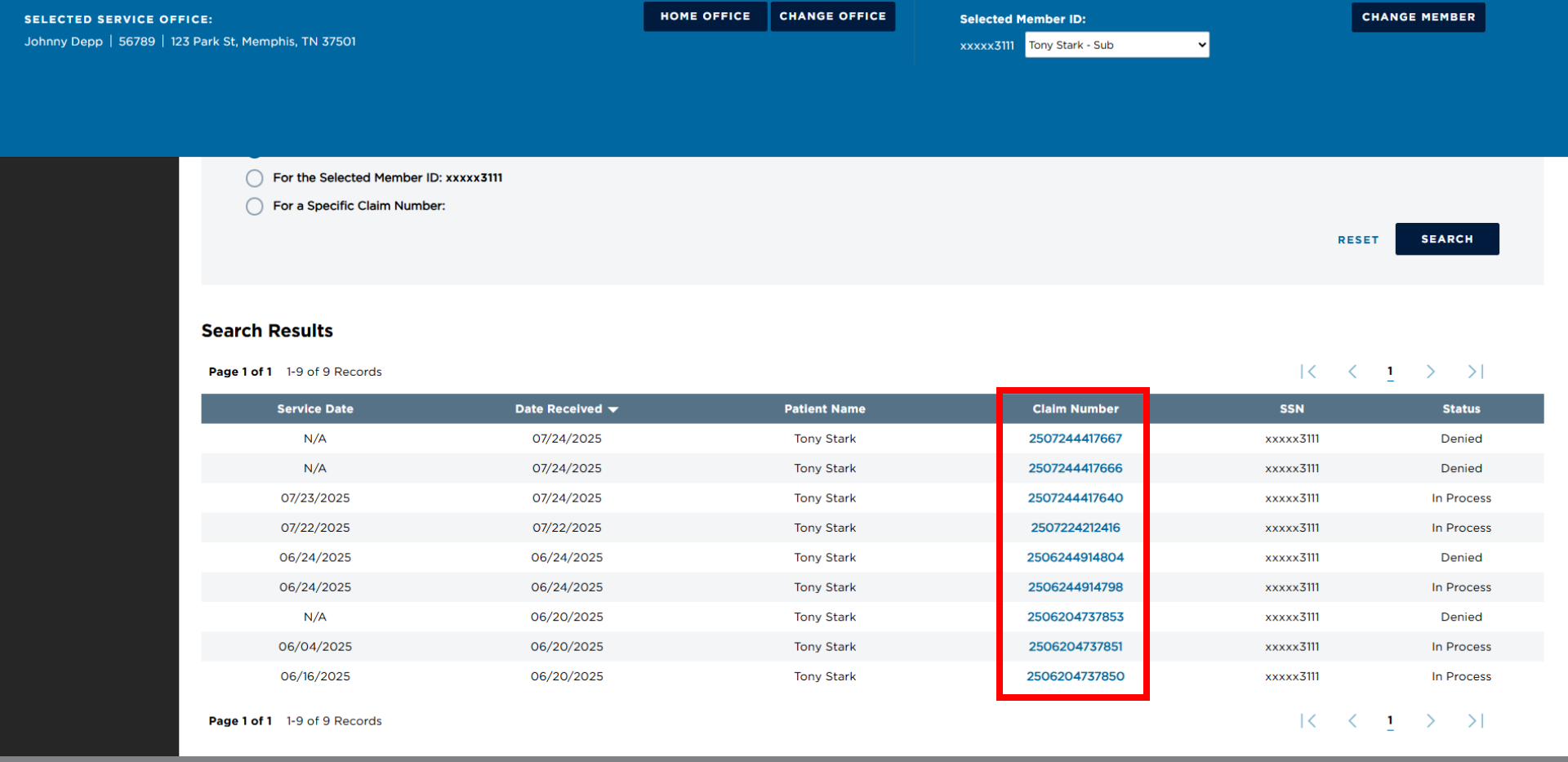
Cancel a Claim

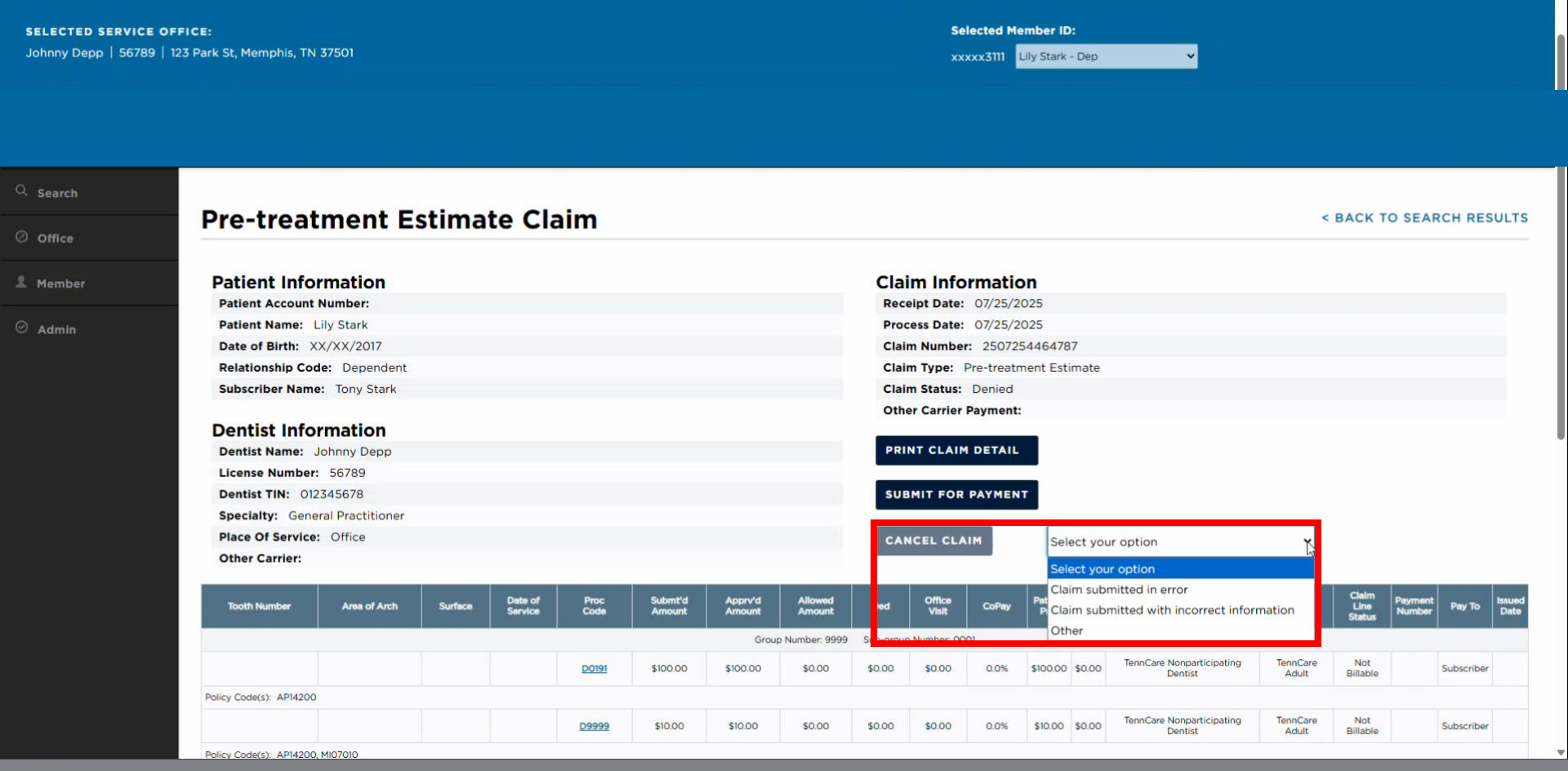
NOTE: Claims that have already been fully adjudicated and EOBs generated *cannot* be cancelled



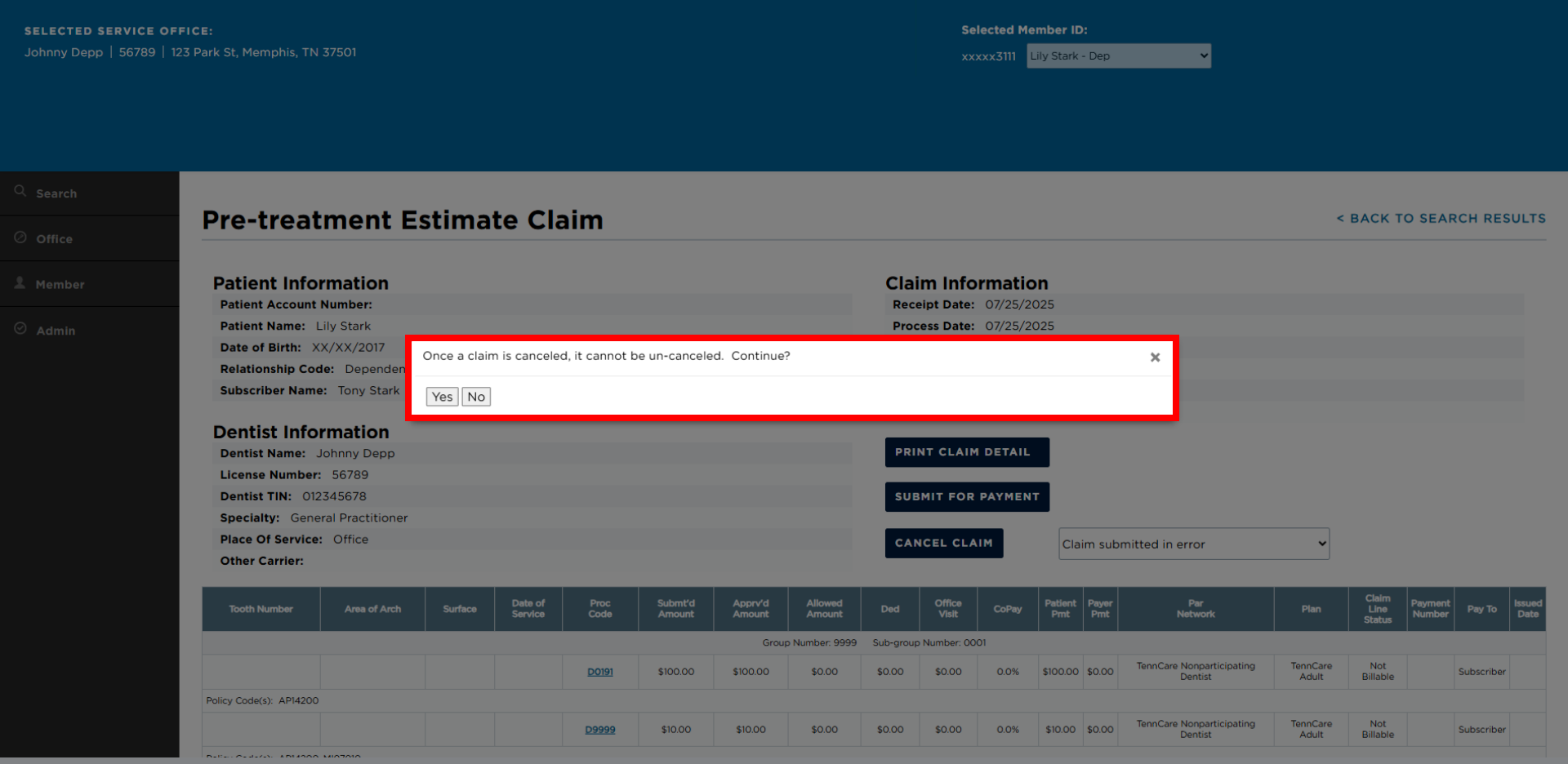
1. Search for the claim you would like to cancel
2. Only claims that have **not yet been paid** can be cancelled; narrow your search window as specific as possible



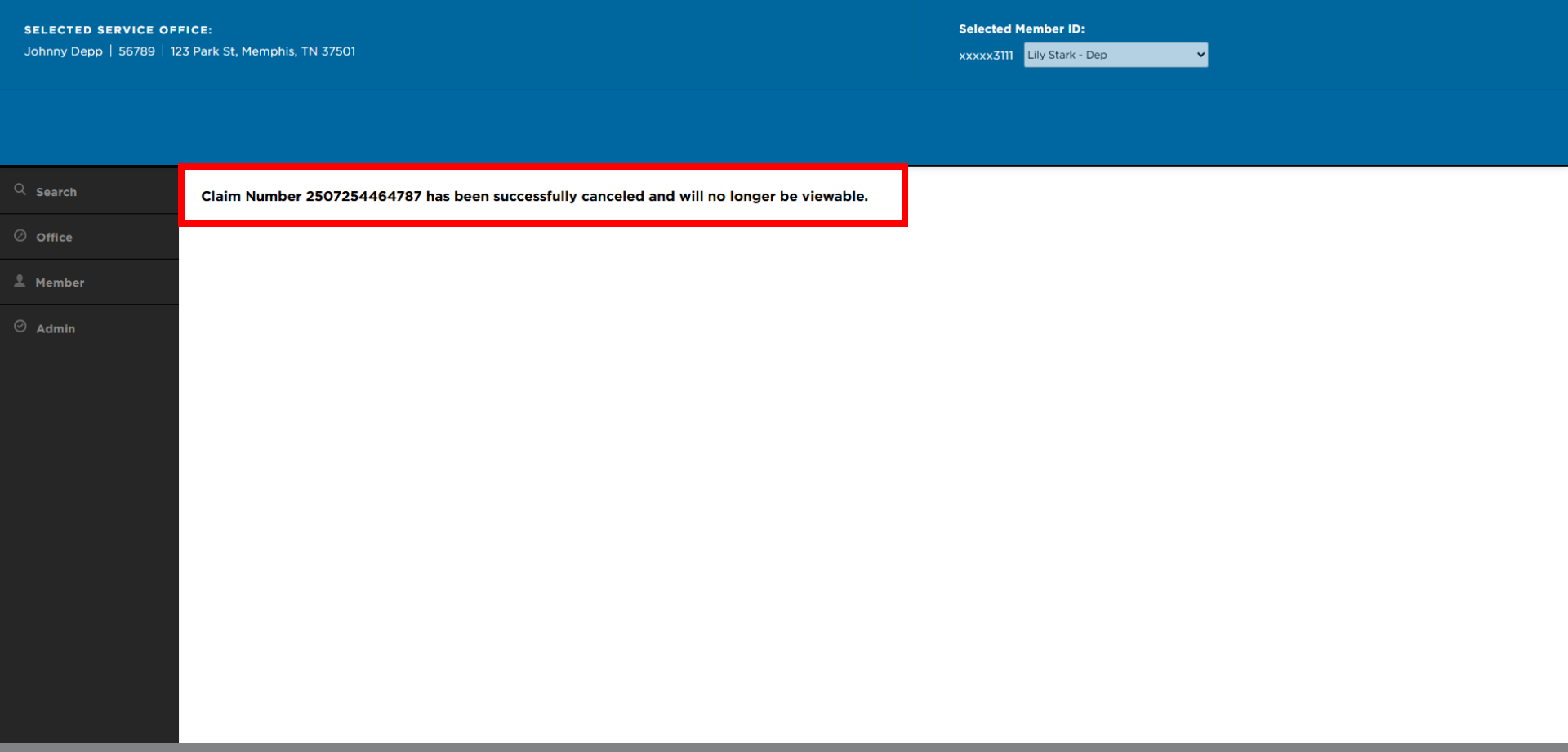
3. After searching, select the claim details to view



4. From the claim details page, choose the reason to cancel the claim and select “Cancel Claim”



5. Select “Yes” to confirm claim cancellation



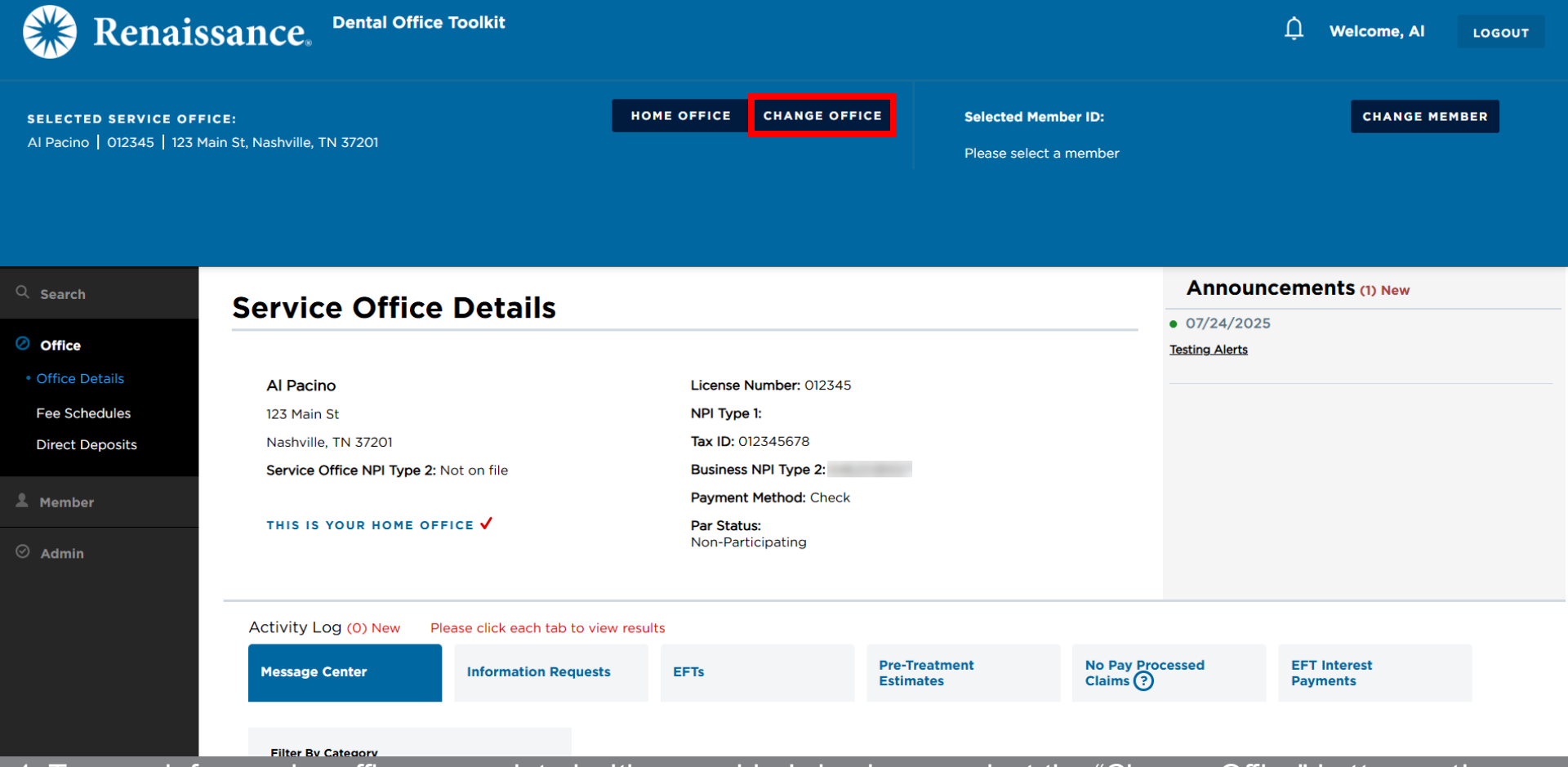
6. Confirm the claim has been cancelled

DDS OFFICE

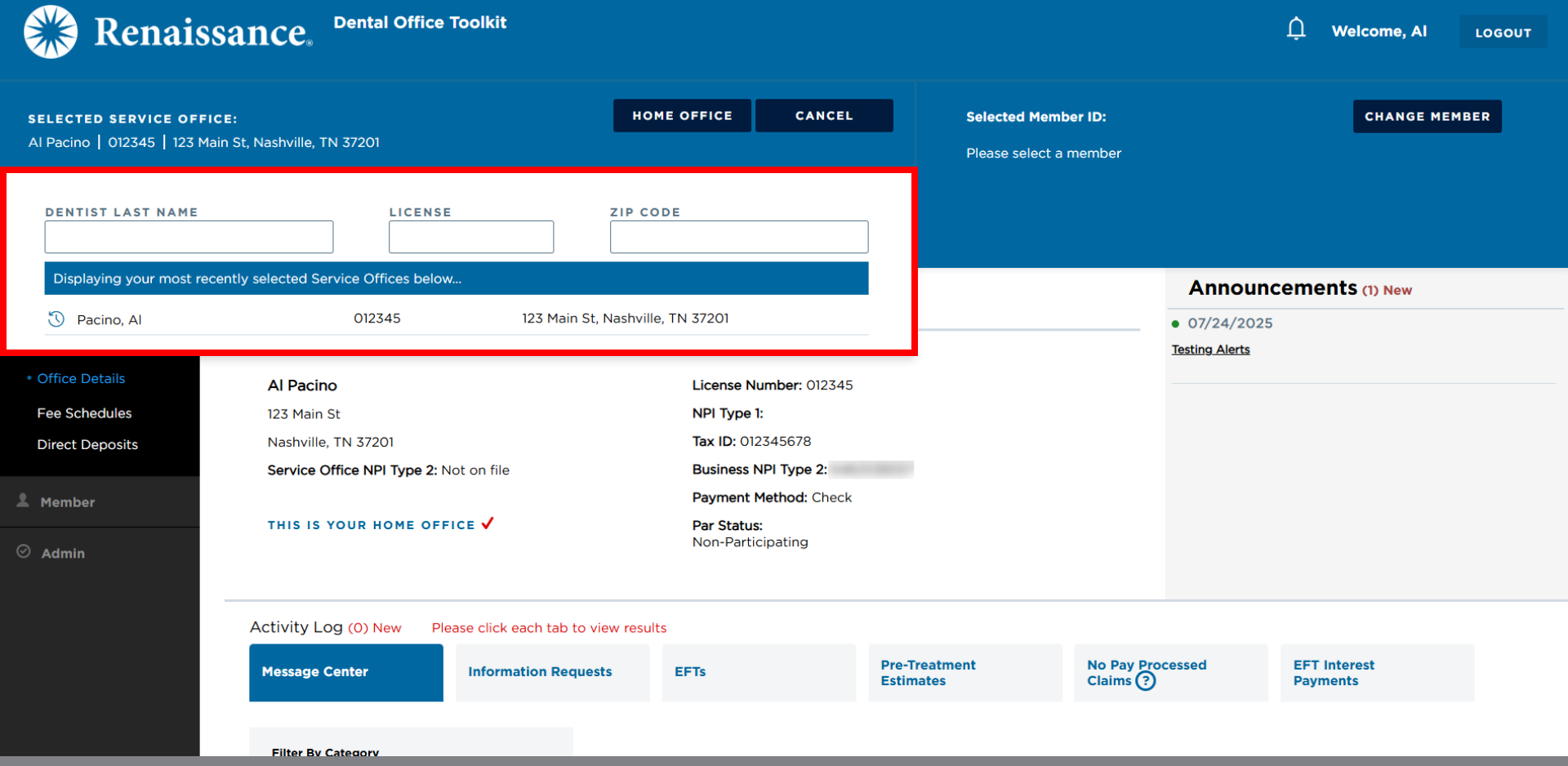
- Select a Service Office
- Set a Home Office
- Metrics Scorecard
- PCD Assignment Details (Dental Home Assignment)
- View Activity Log
- Secure Messaging
- Register for Direct Deposit
- View and Manage EFTs

Renaissance®

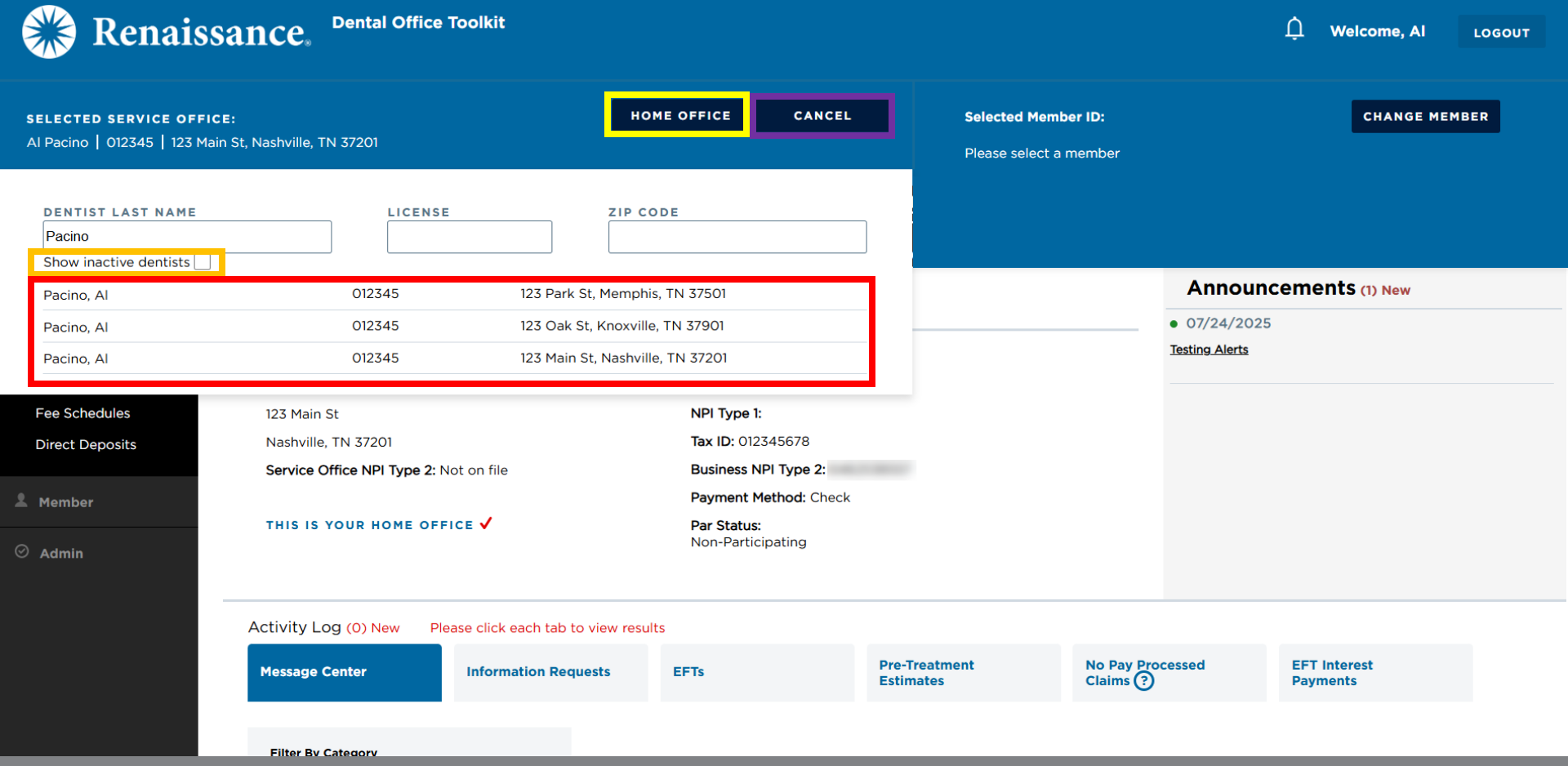
Select a Service Office



1. To search for service offices associated with a provider's business, select the "Change Office" button on the top home bar



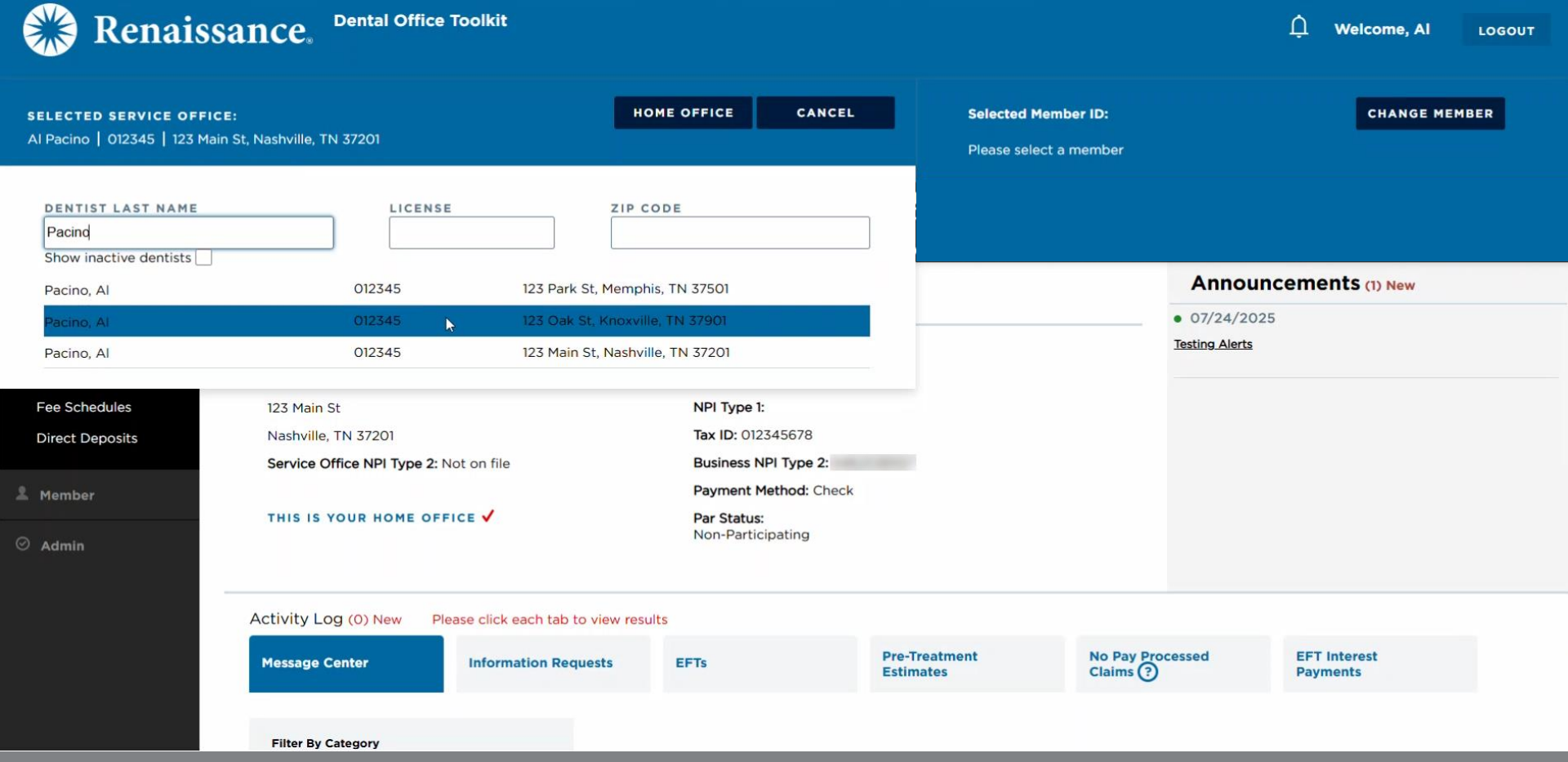
2. Search for any office associated with the business using last name, license, or ZIP Code
3. Search results will appear as the information is being typed in real-time



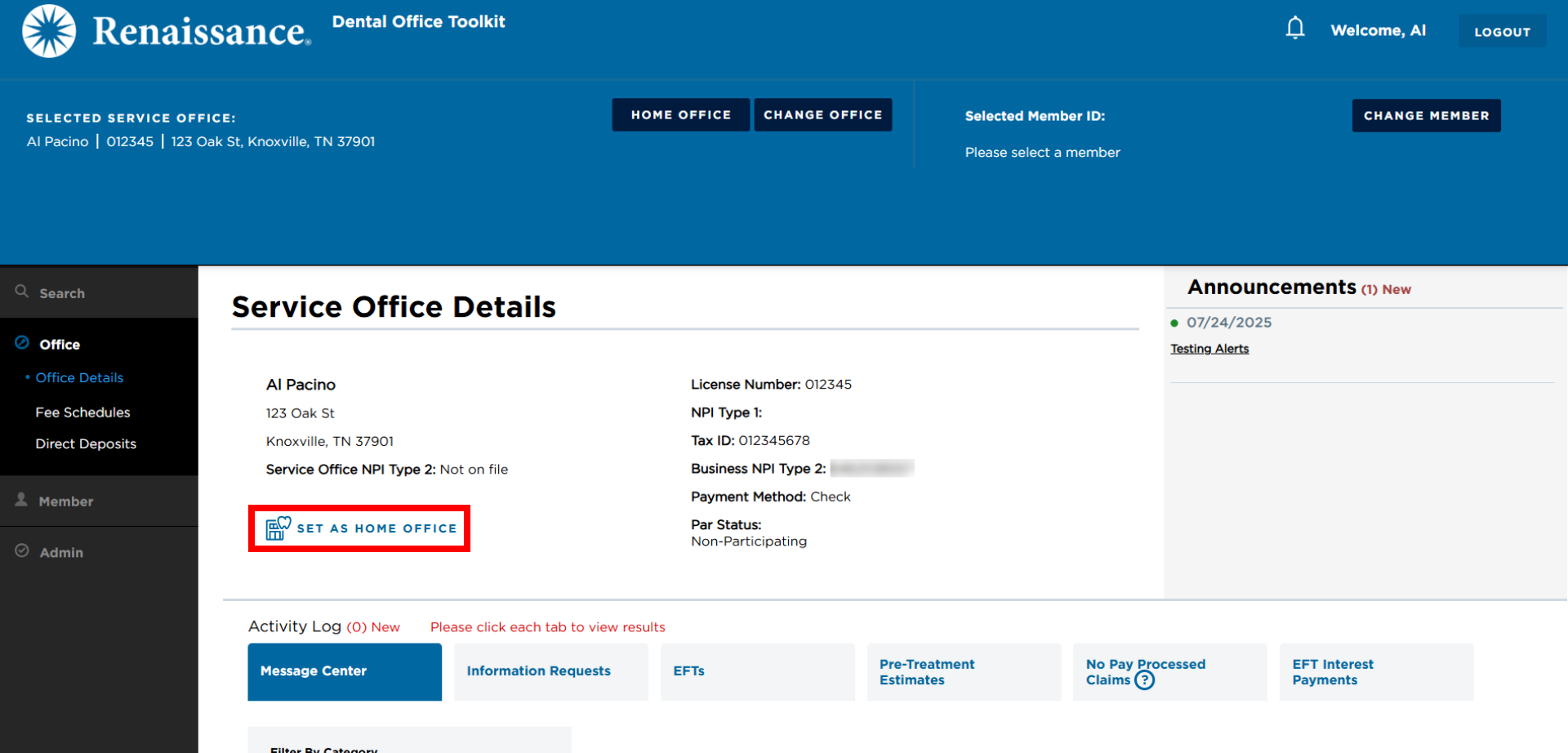
4. In the yellow box, you can return back to the home office that has been identified
5. In the purple box, you can cancel out of the search
6. In the orange box, you can include inactive providers in the search
7. In the red box, you can view all search results

Renaissance®

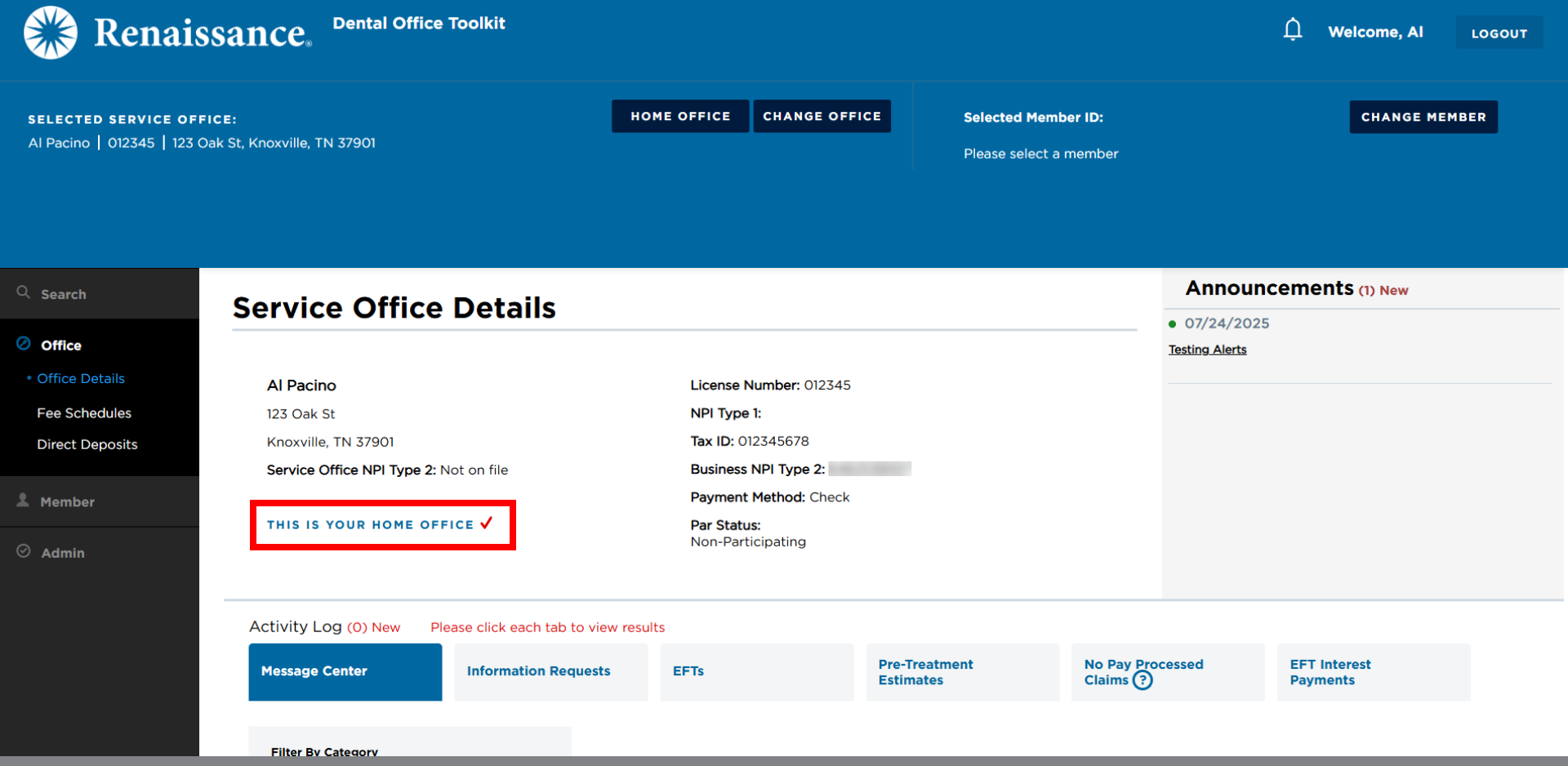
Set a Home Office



1. Click “Change Office” and find the office you would like to set as a home office



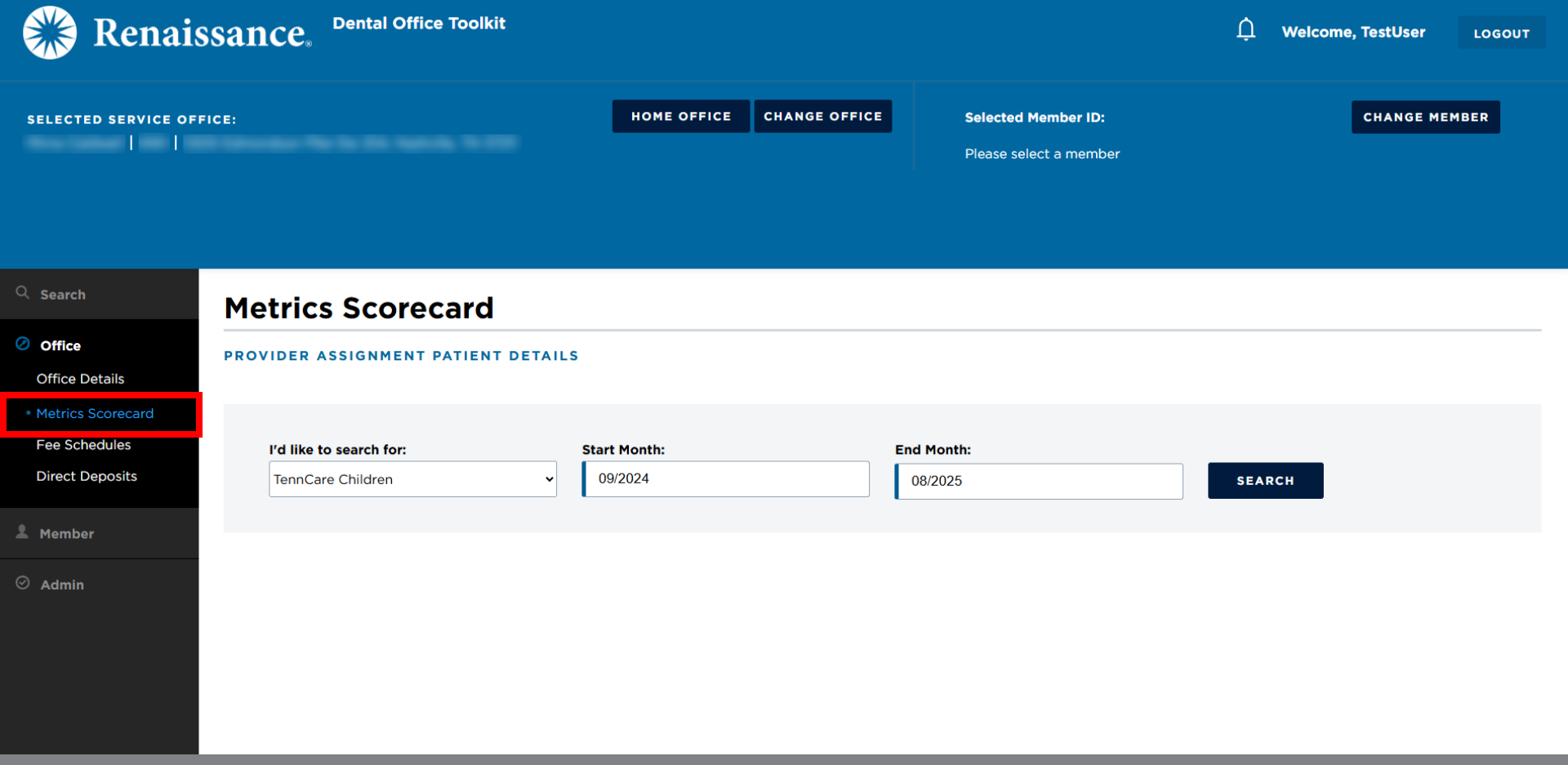
2. Click “Set as Home Office”



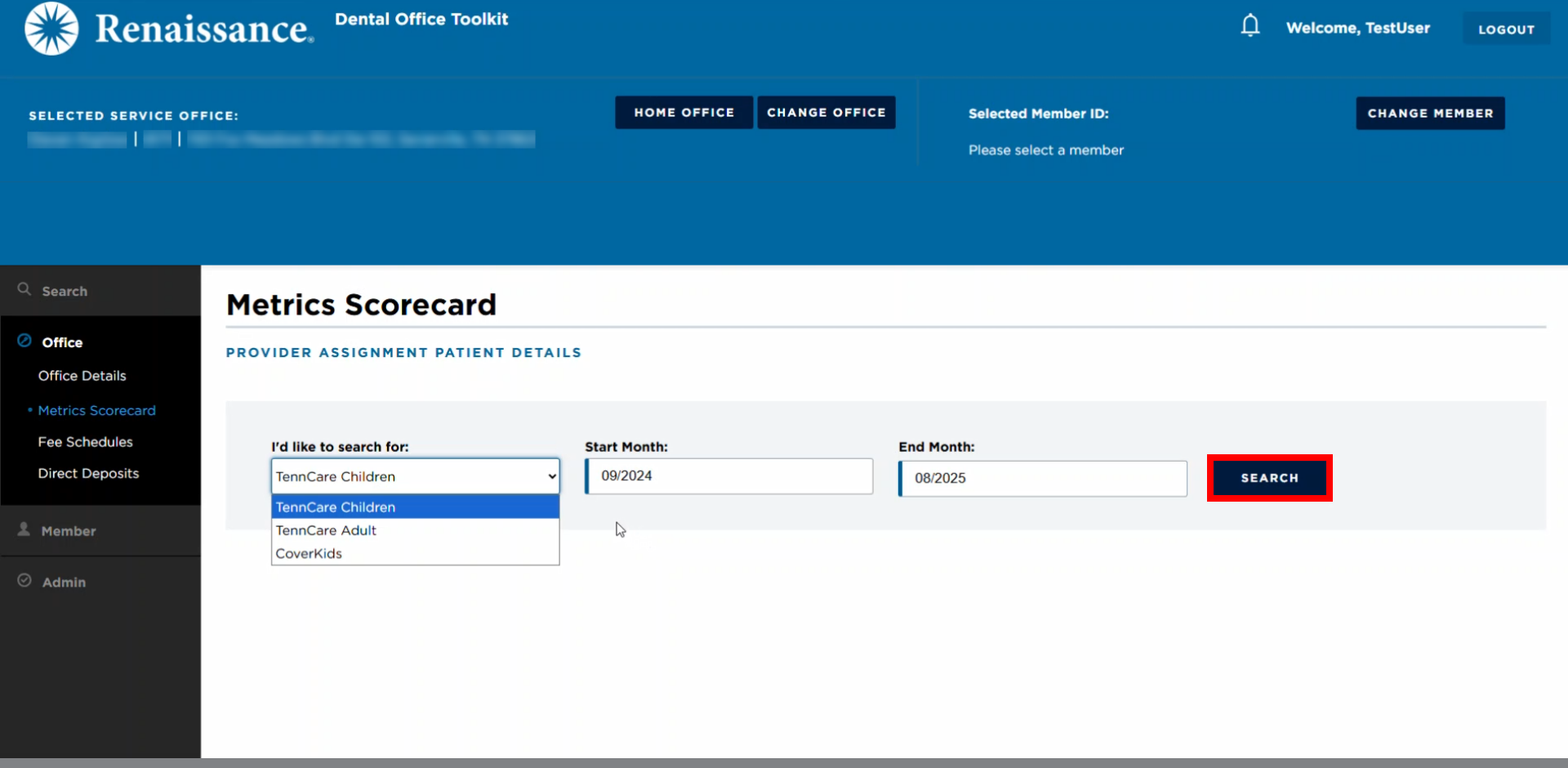
3. You will see a check mark for the home office you have set

Renaissance®

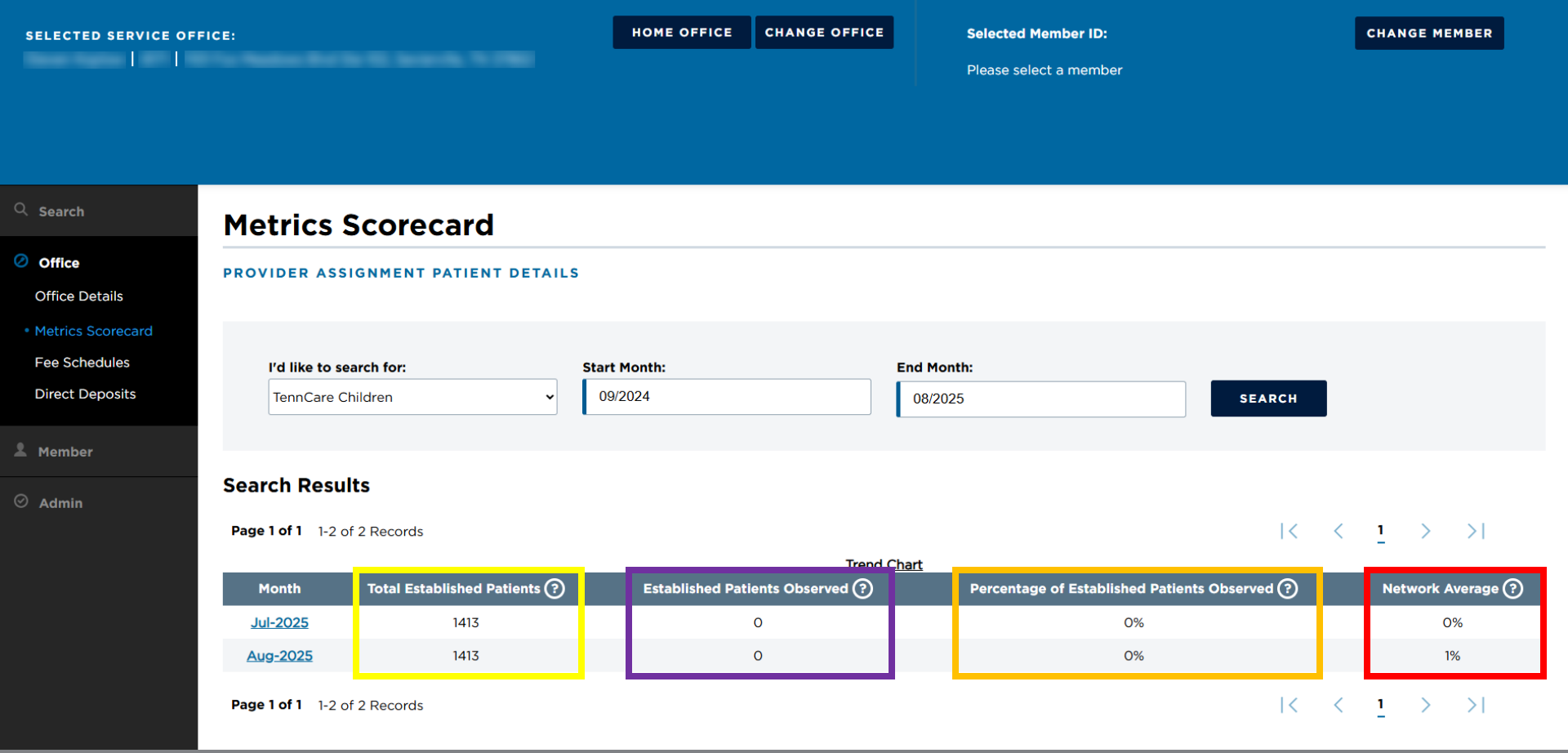
Metrics Scorecard



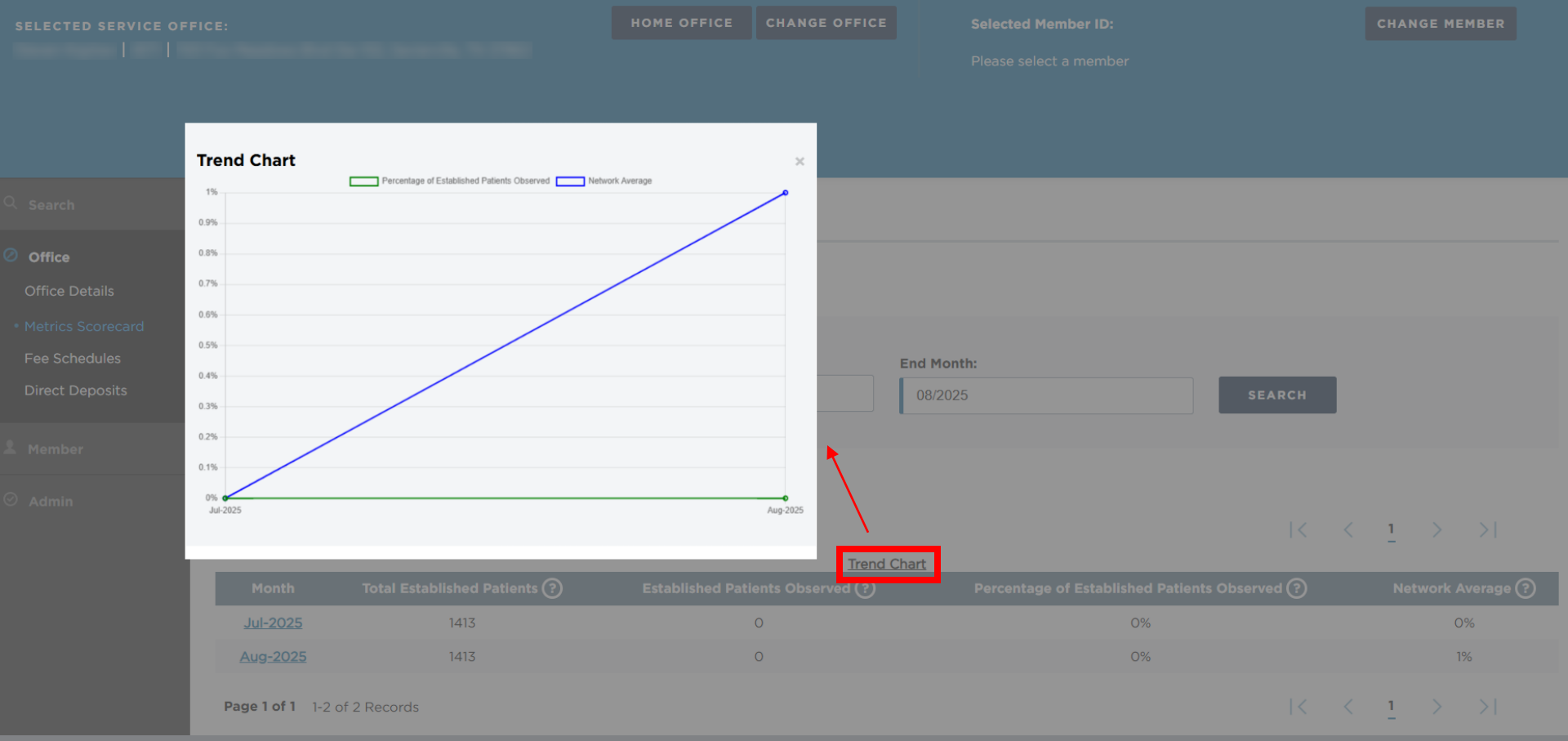
1. Navigate to the Office tab and click “Metrics Scorecard”



2. Set your desired search criteria and click Search. The dropdown menu shown will display the networks associated with a given user



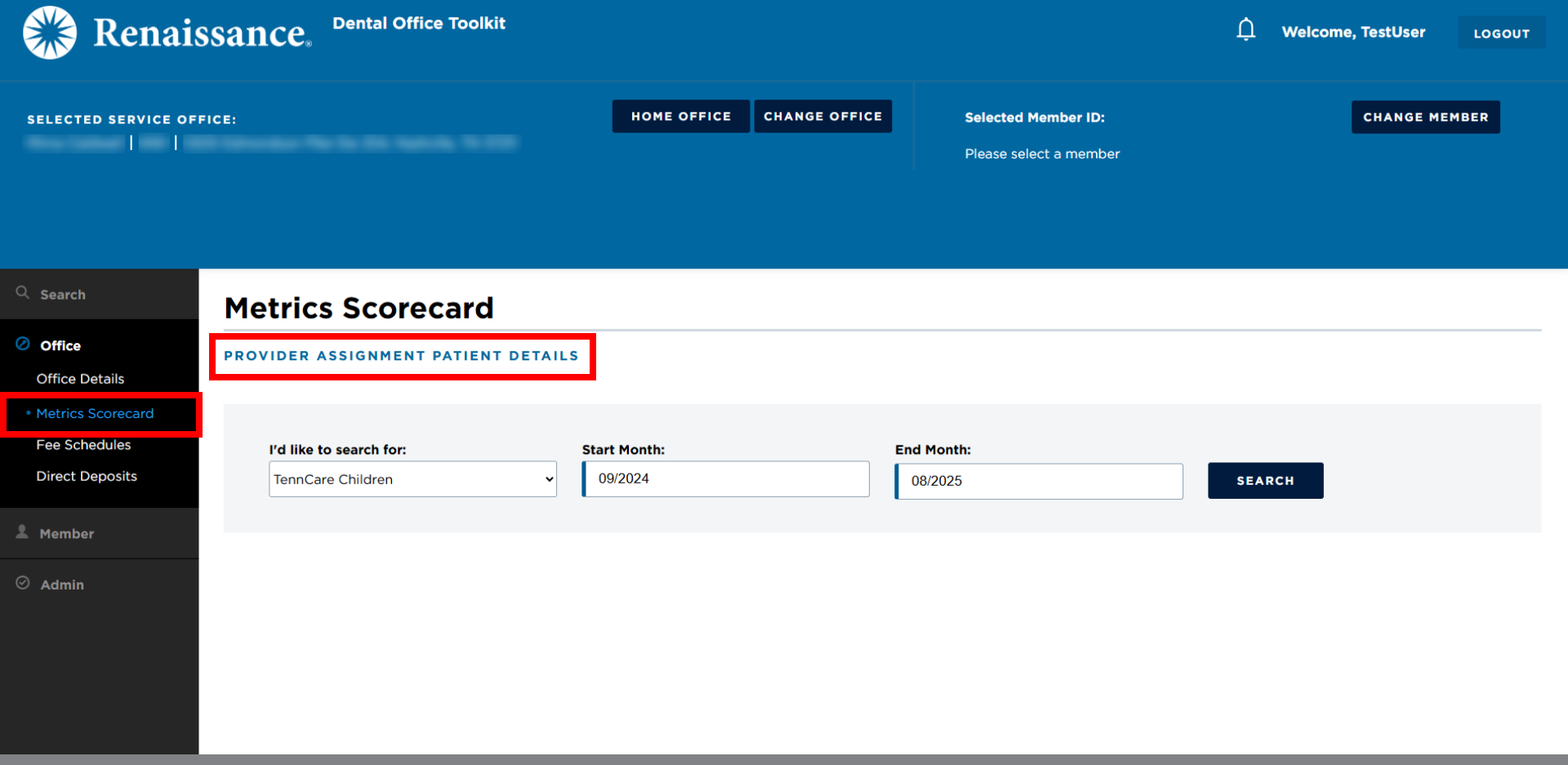
4. Values in the yellow box represent the total number of established patients for this provider in the previous two calendar years
5. Values in the purple box represent the total number of established patients seen by the provider in the corresponding month
6. Values in the orange box represent the percentage of established patients that have been seen by the provider that month
7. Values in the red box represent the monthly average of all network providers for the selected category



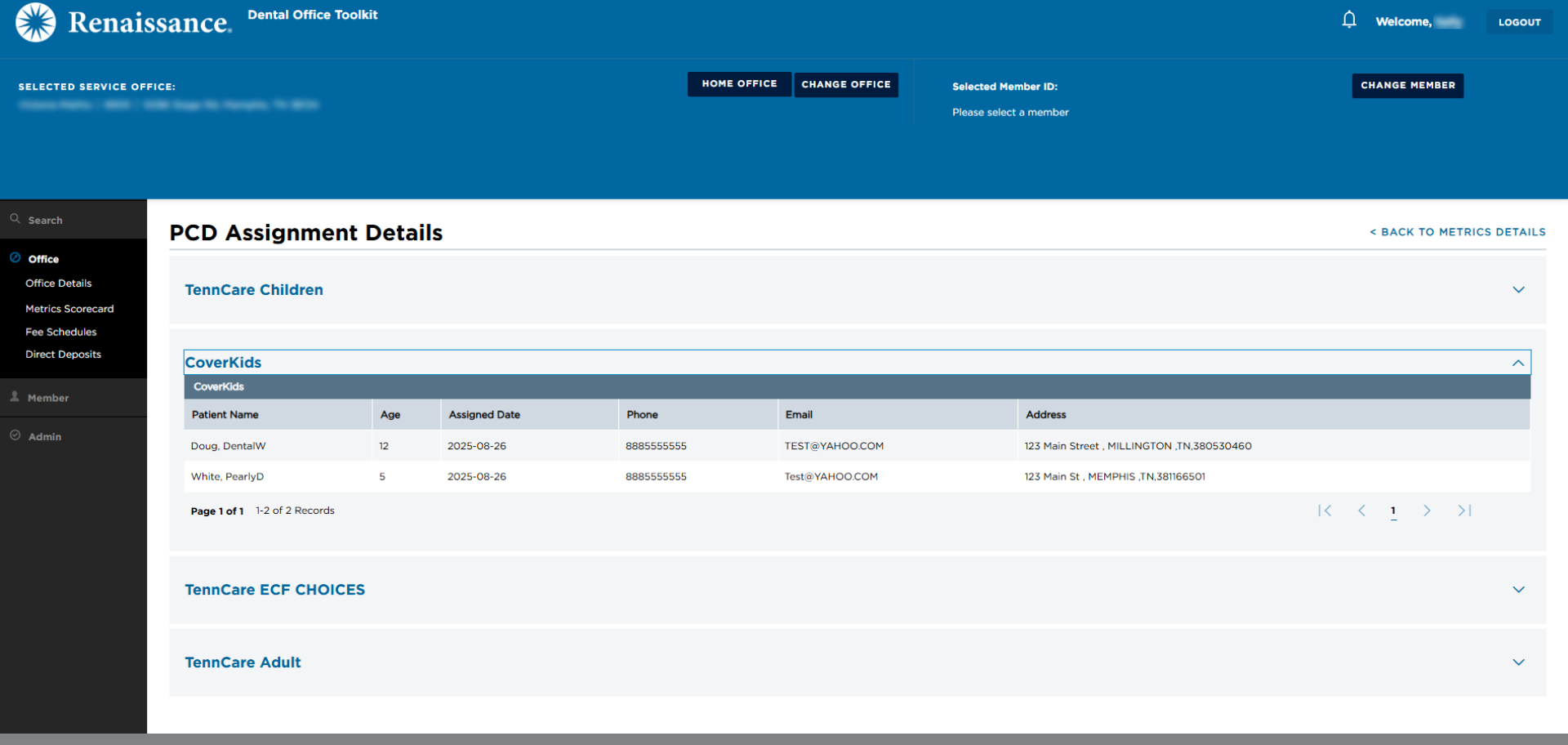
NOTE: Selecting “Trend Chart” allows users to view a graph of the Percentage of Established Patients Observed and the Network Average

Renaissance®

PCD Assignment Details (Dental Home Assignment)



1. Navigate to the Office tab and click “Metrics Scorecard”
2. Click “Provider Assignment Patient Details”



3. This screen displayed the networks associated with a given provider
4. Users can select the dropdown of each network section header to view patients assigned to that provider

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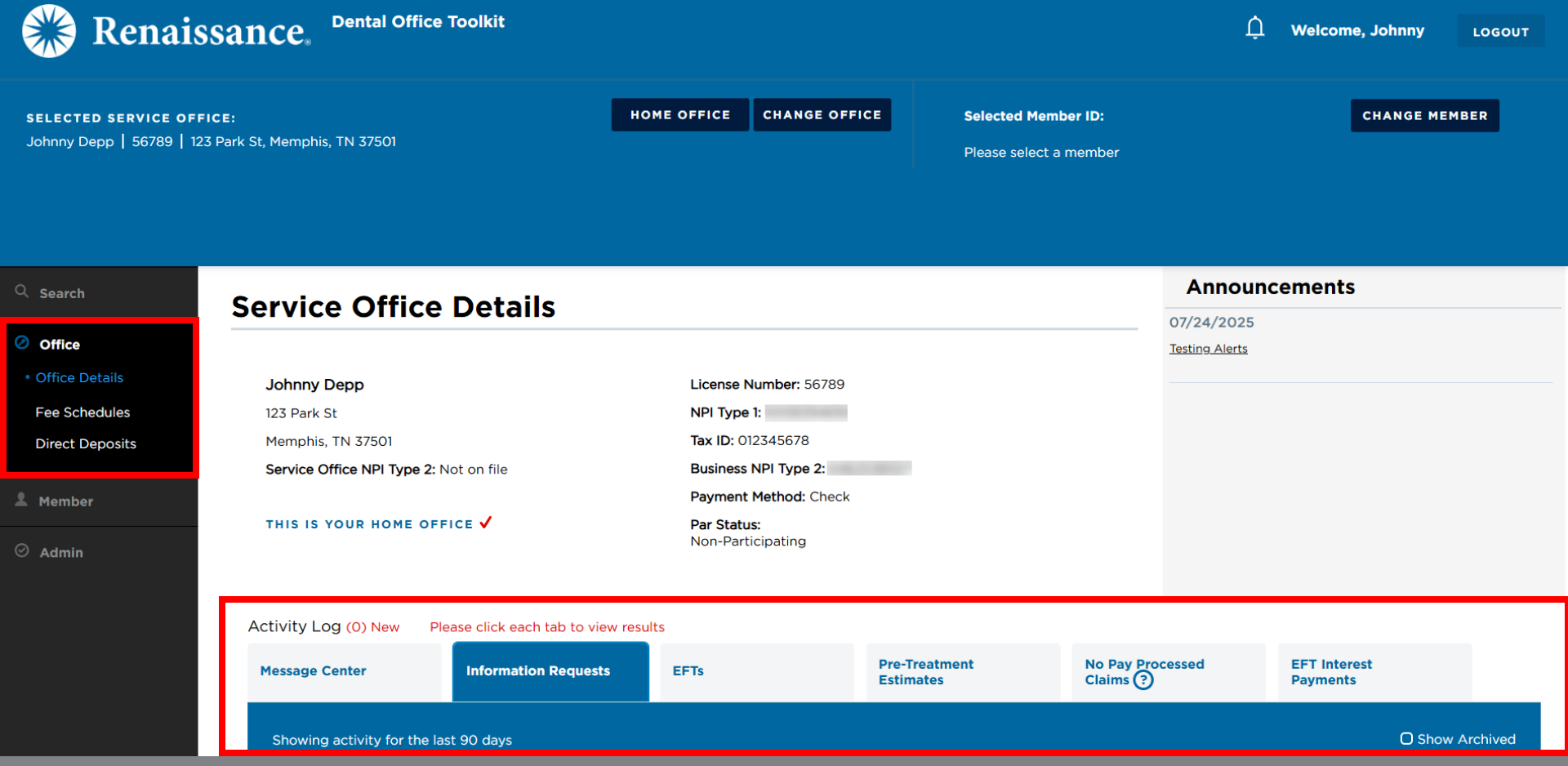
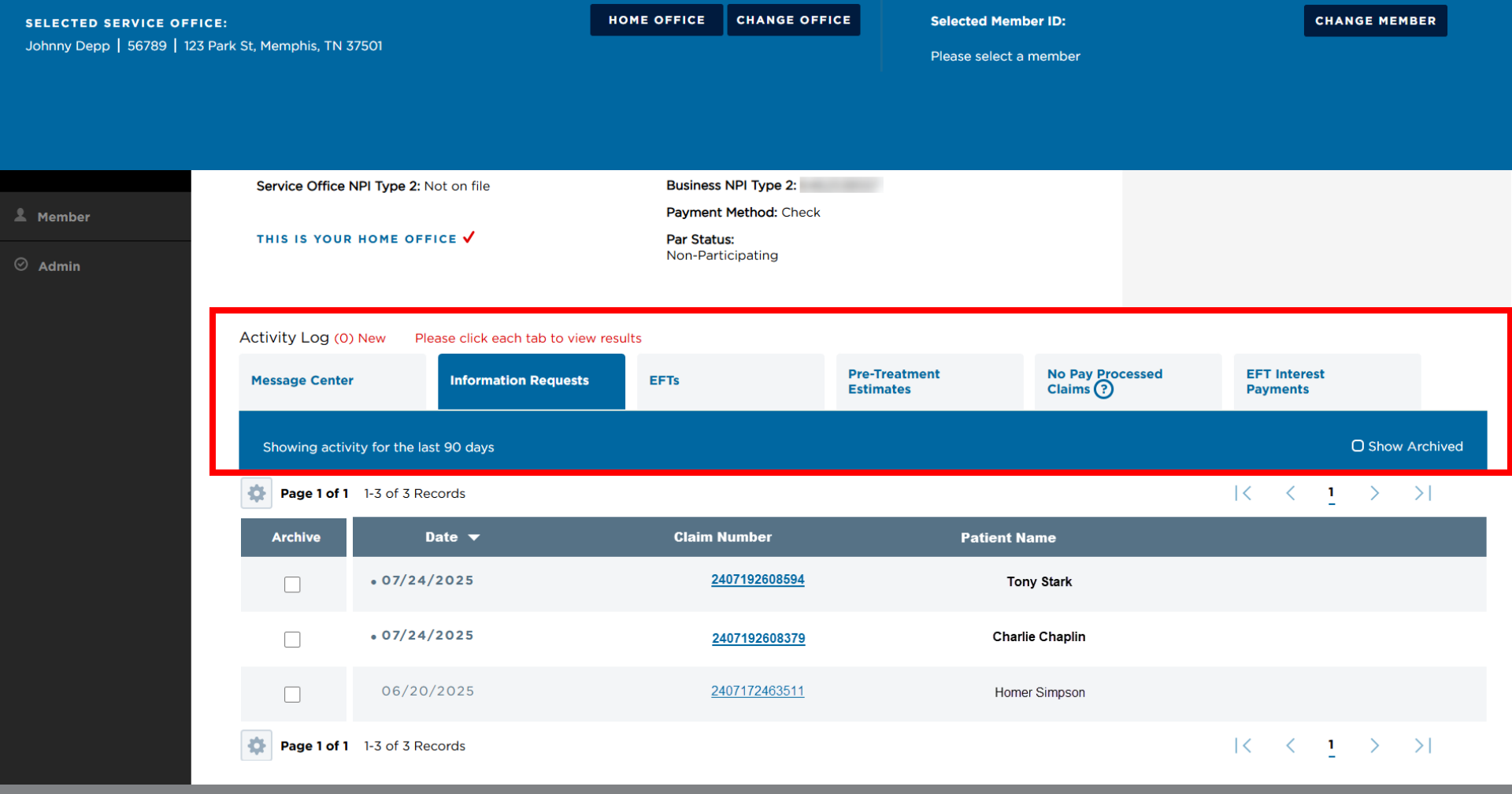
View Activity Log



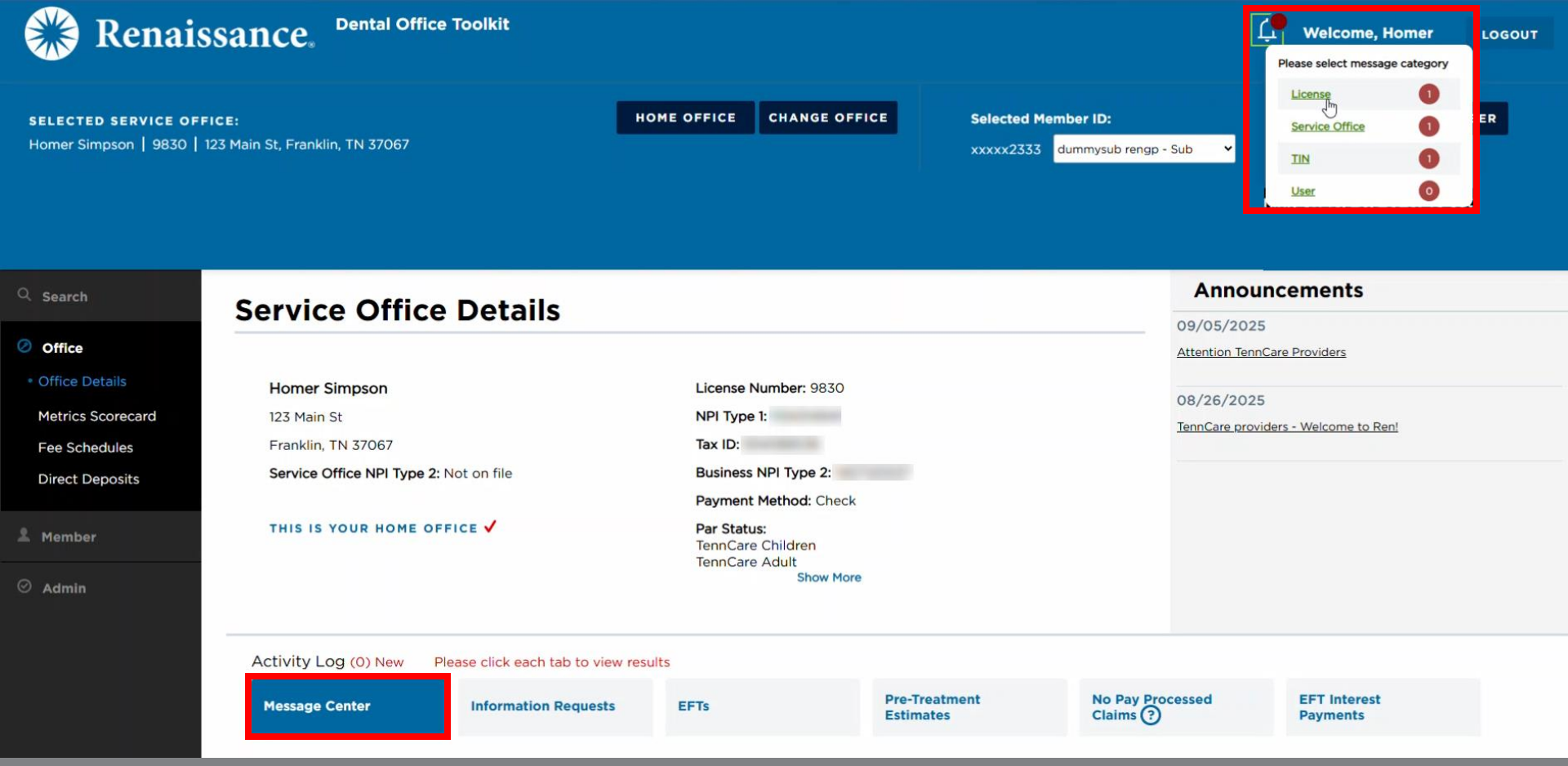
1. Select “Office Details” on the left-hand navigation bar
2. View the Activity Log as shown in red



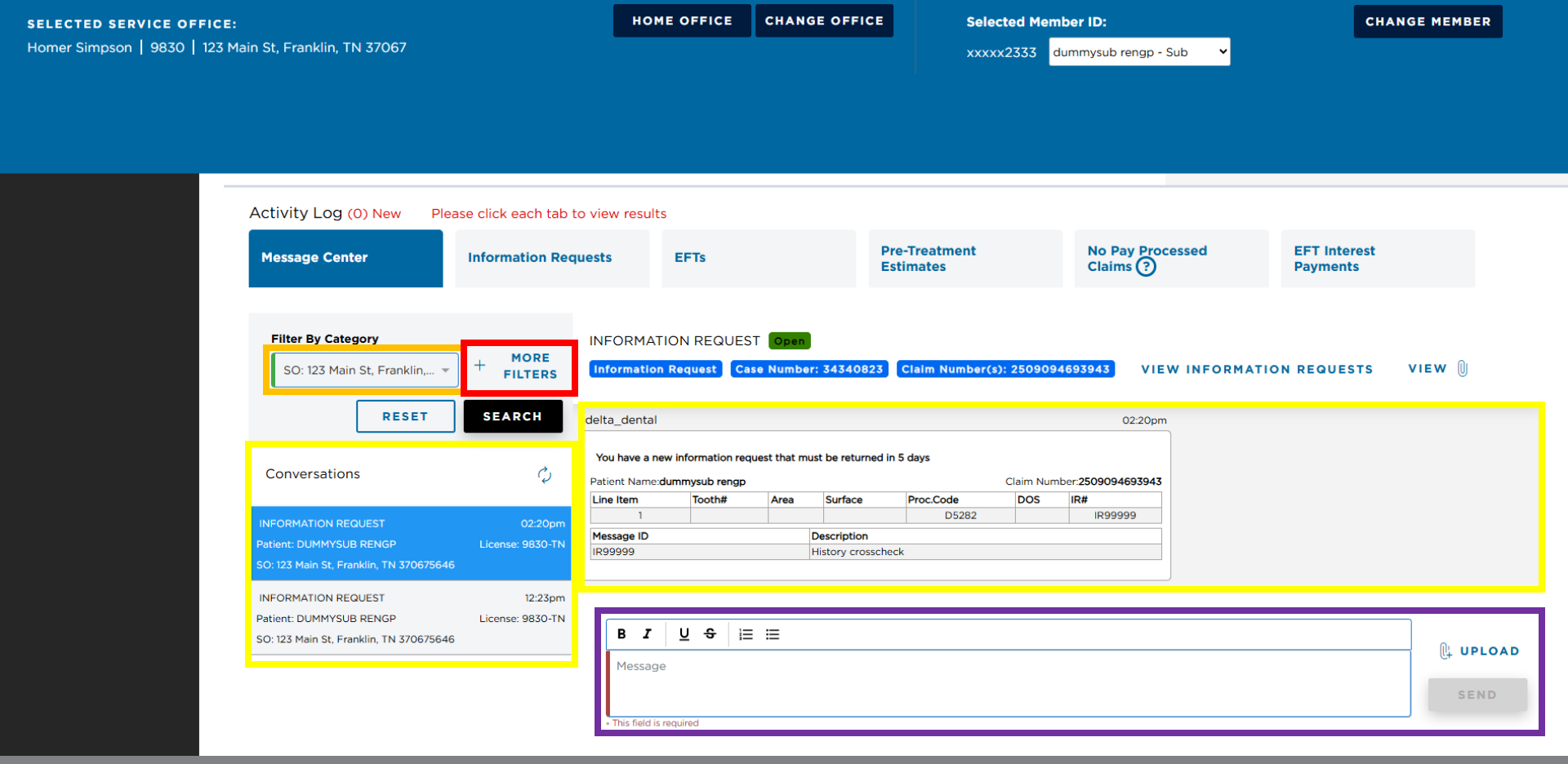
3. You can toggle between all sections and items in the activity log as desired
4. You can easily store any records by clicking the “Archive” check box outlined in blue

Renaissance®

Secure Messaging



1. To view Secure Messaging, click on the “Message Center” tab on the Activity Log, OR click on the bell icon which shows a red dot when there is a new message



2. In the yellow boxes, you can view secure Messaging conversations and details
3. In the purple box, you can message the Customer Service team
4. In the orange box, you can select the dropdown to filter by License Number, Service Office Address, Tax ID Number, and name of user
5. In the red box, you can use additional filter options of Licenses, Service Offices, and Status

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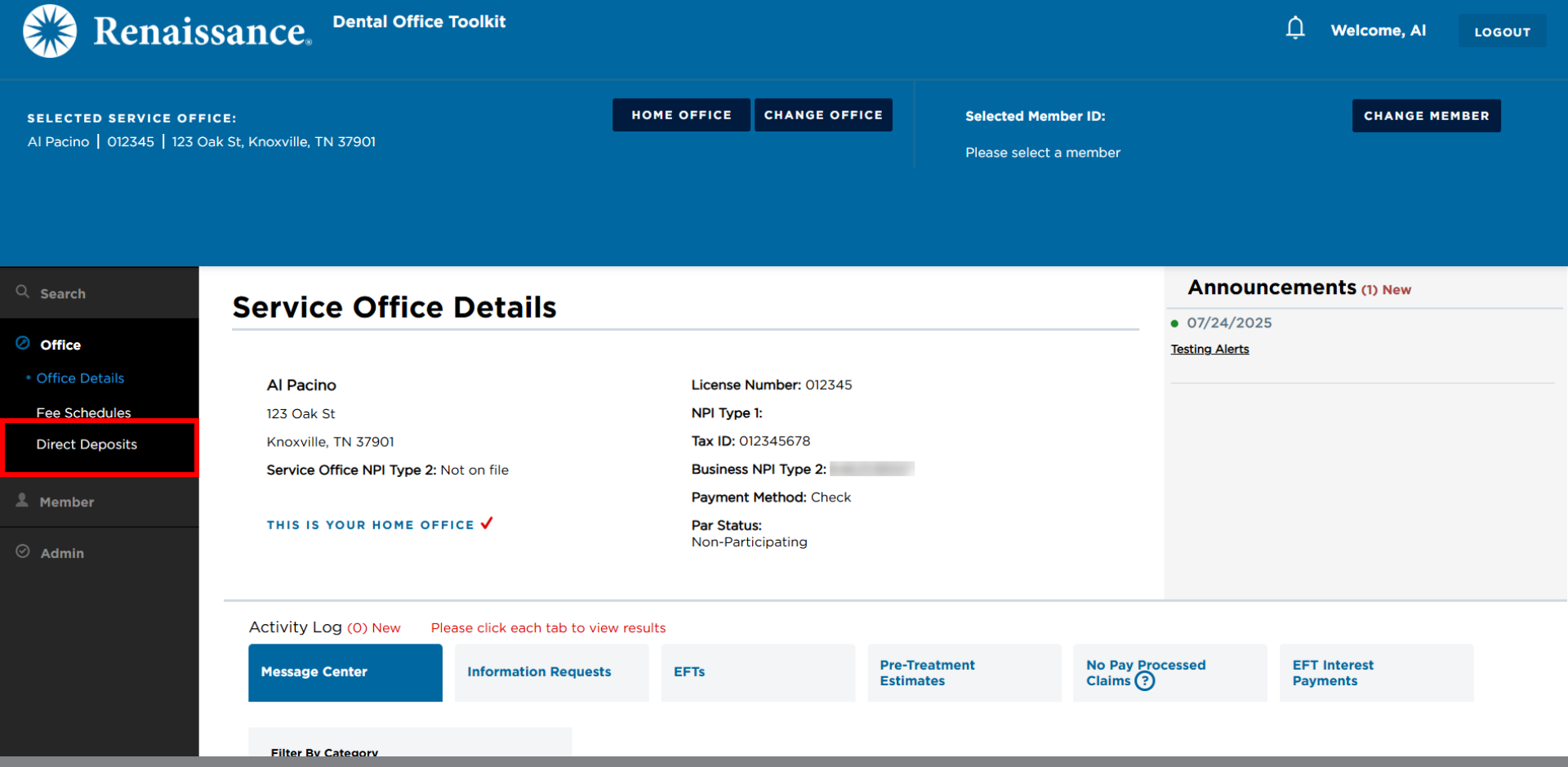
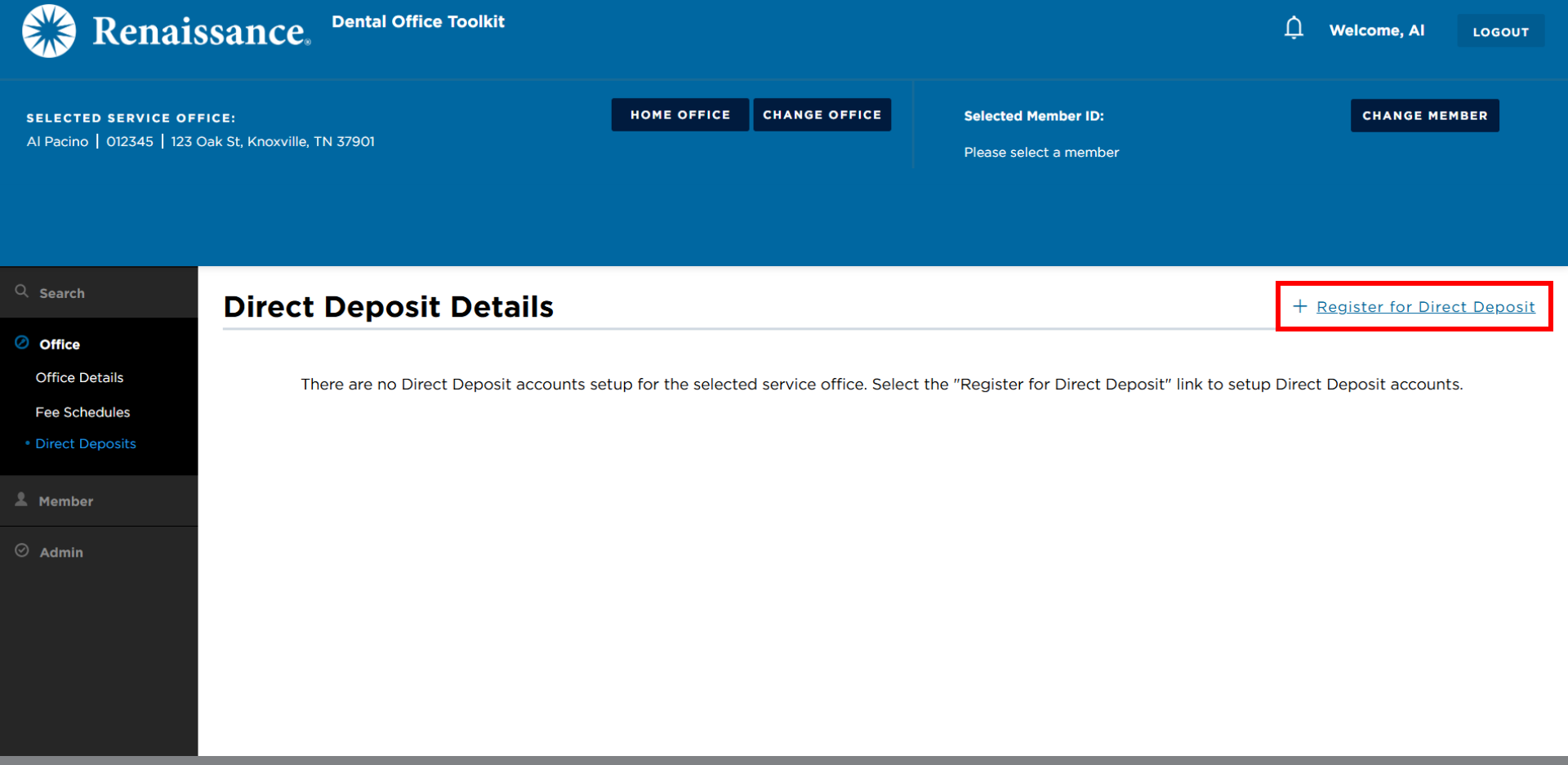
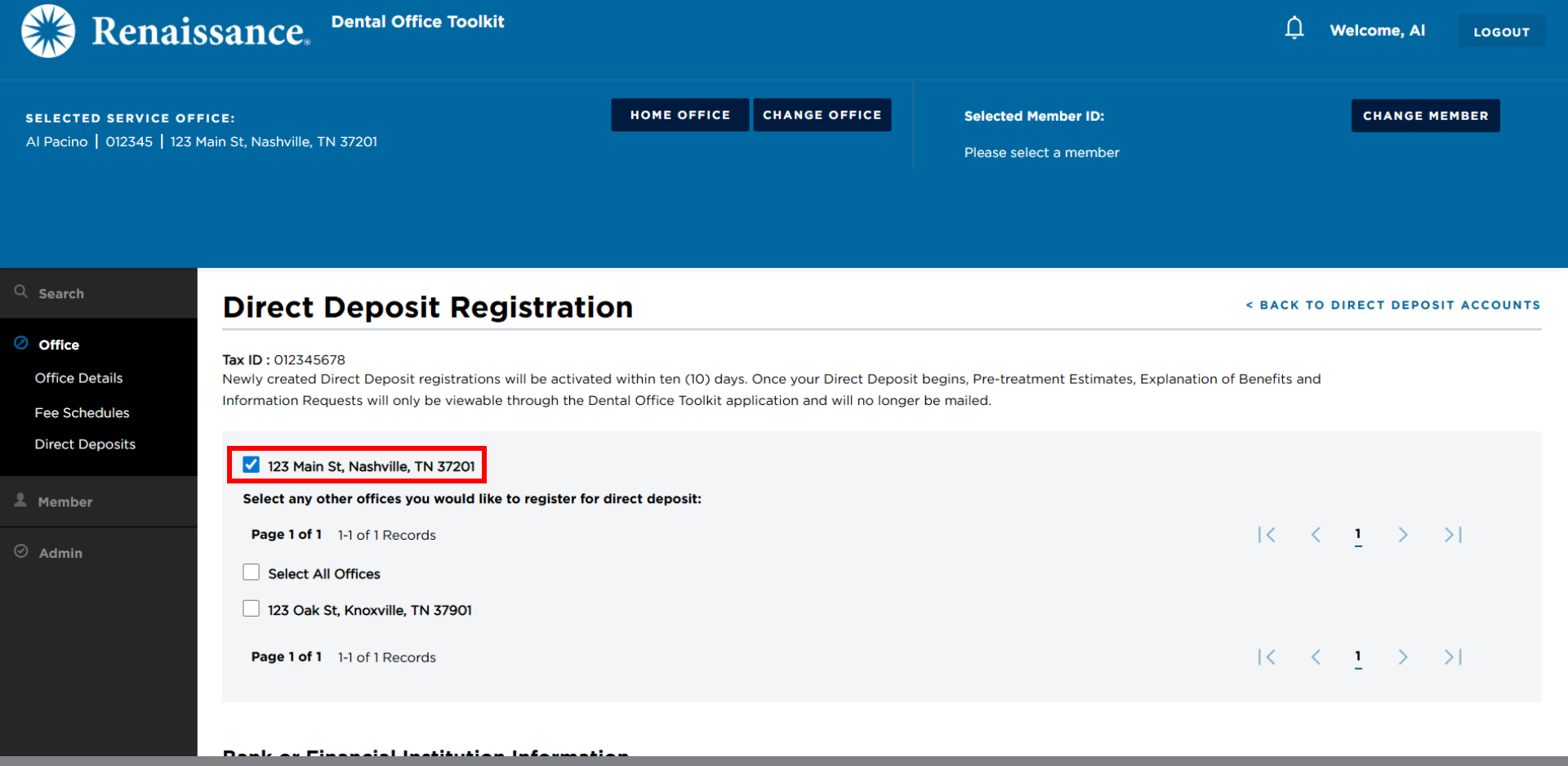
Register for Direct Deposit



1. Under the “Office” section of the left-hand navigation, click on “Direct Deposits”



2. If you have not registered, click on “Register for Direct Deposit” in the upper right-hand corner



3. Confirm your service office

SELECTED SERVICE OFFICE:
Al Pacino | 012345 | 123 Main St, Nashville, TN 37201

HOME OFFICE | CHANGE OFFICE

Selected Member ID:
Please select a member

CHANGE MEMBER

Bank or Financial Institution Information

Your Name (person keying in information)

Name on Account (as it appears on bank account)

Email Address
example@deltadentalmi.com

Bank or Financial Institution Name

Account Type
Select

Routing Number

Confirm Routing Number

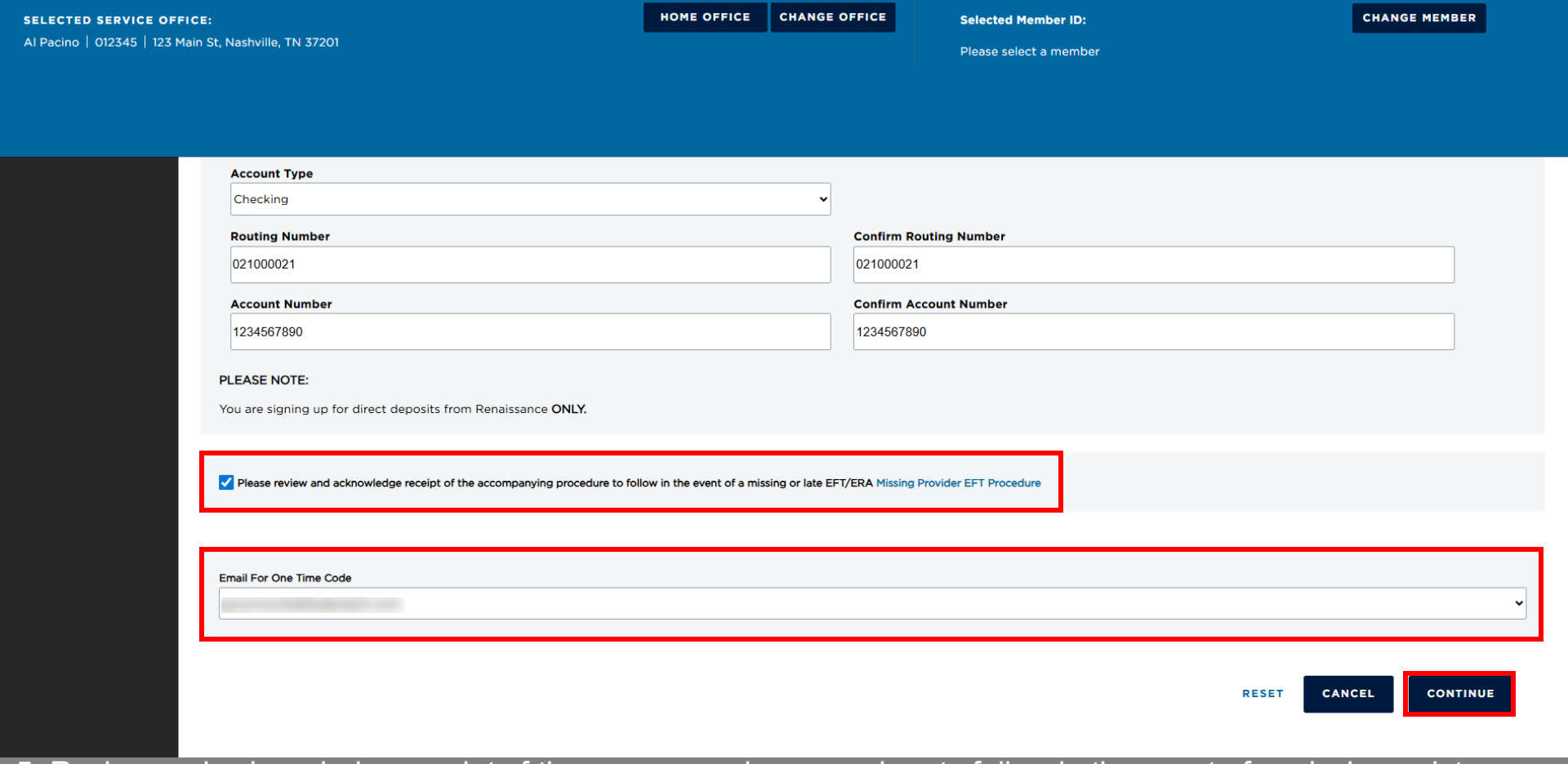
Account Number

Confirm Account Number

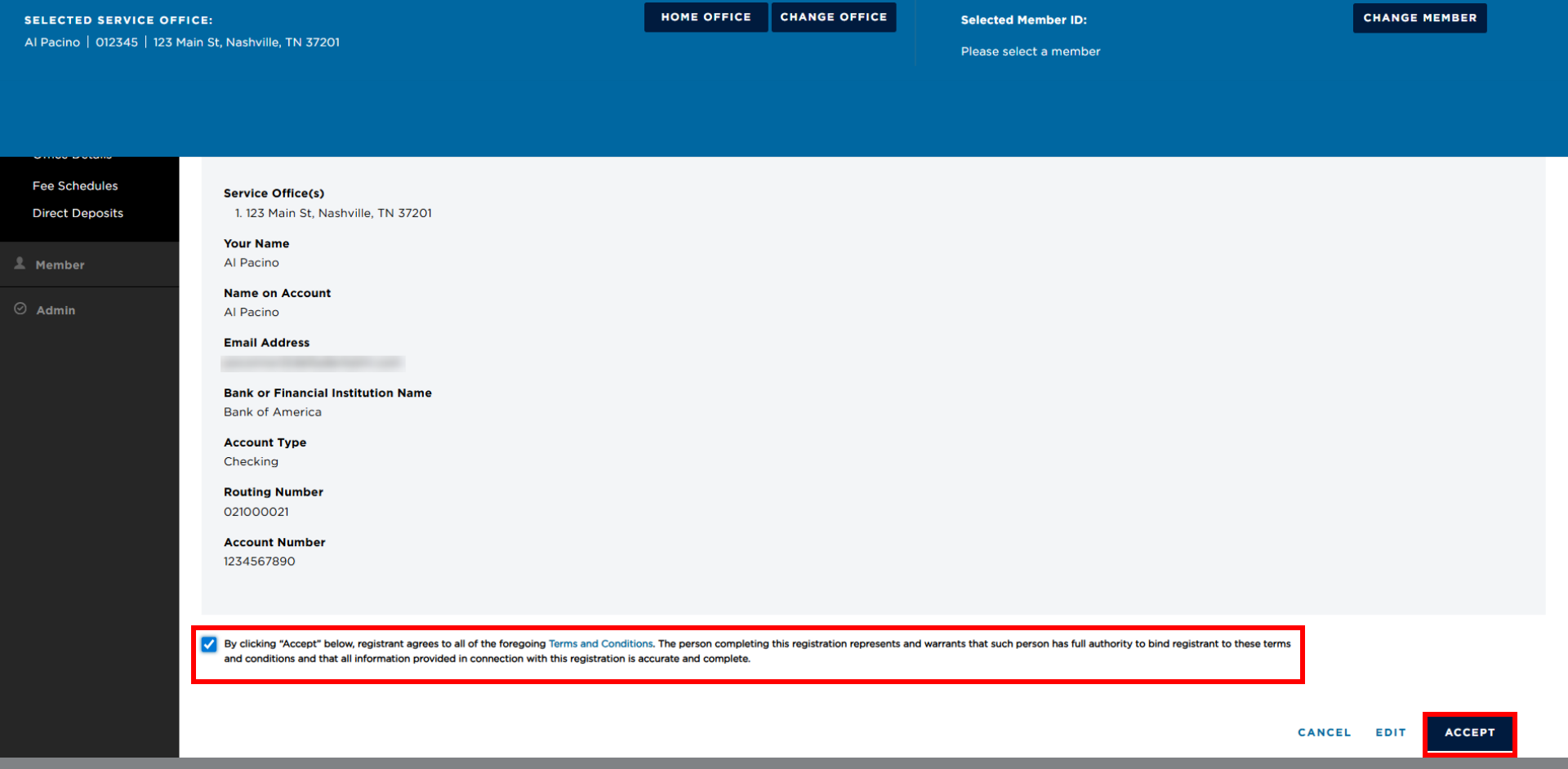
PLEASE NOTE:

You are signing up for direct deposits from Renaissance **ONLY.**

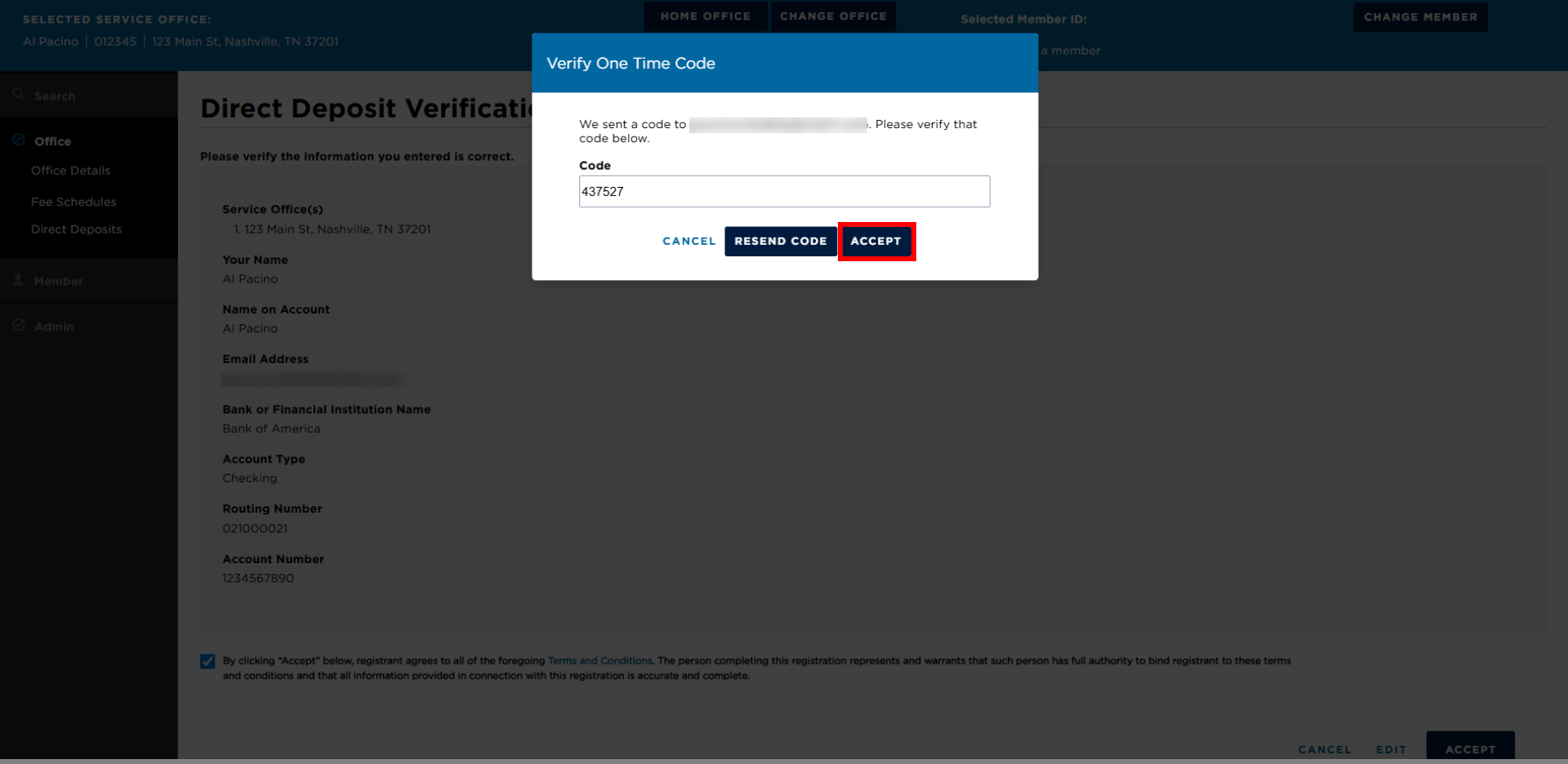
4. Fill out your Bank or Financial Institution Information



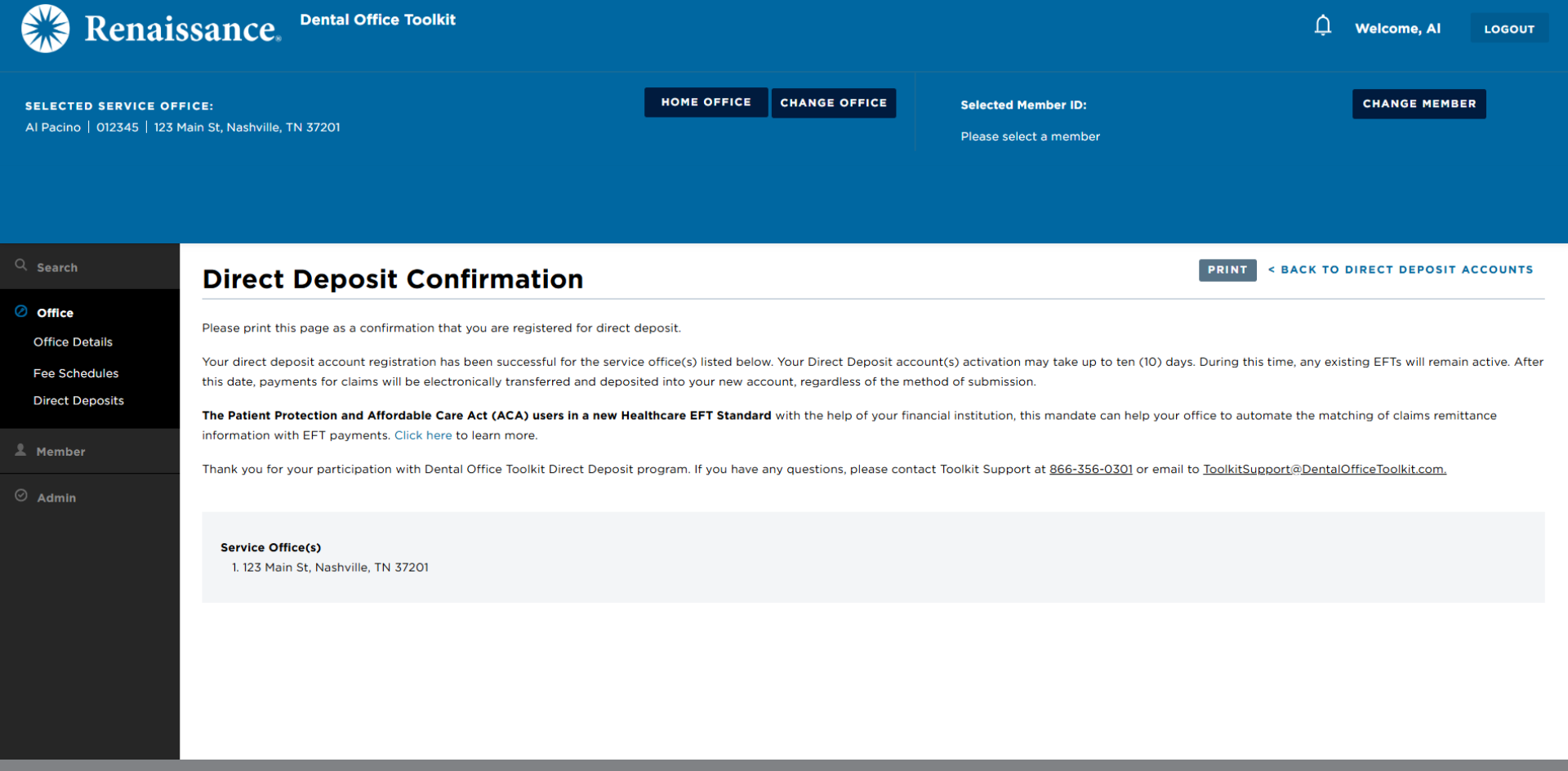
5. Review and acknowledge receipt of the accompanying procedure to follow in the event of a missing or late EFT/ERA
6. Select the email address from the dropdown that the one time code will be sent to
7. Click “Continue”



8. Review and certify your acceptance by clicking the check box
9. Click “Accept”



10. Enter the one time code from the email and click “Accept”



11. View your direct deposit confirmation

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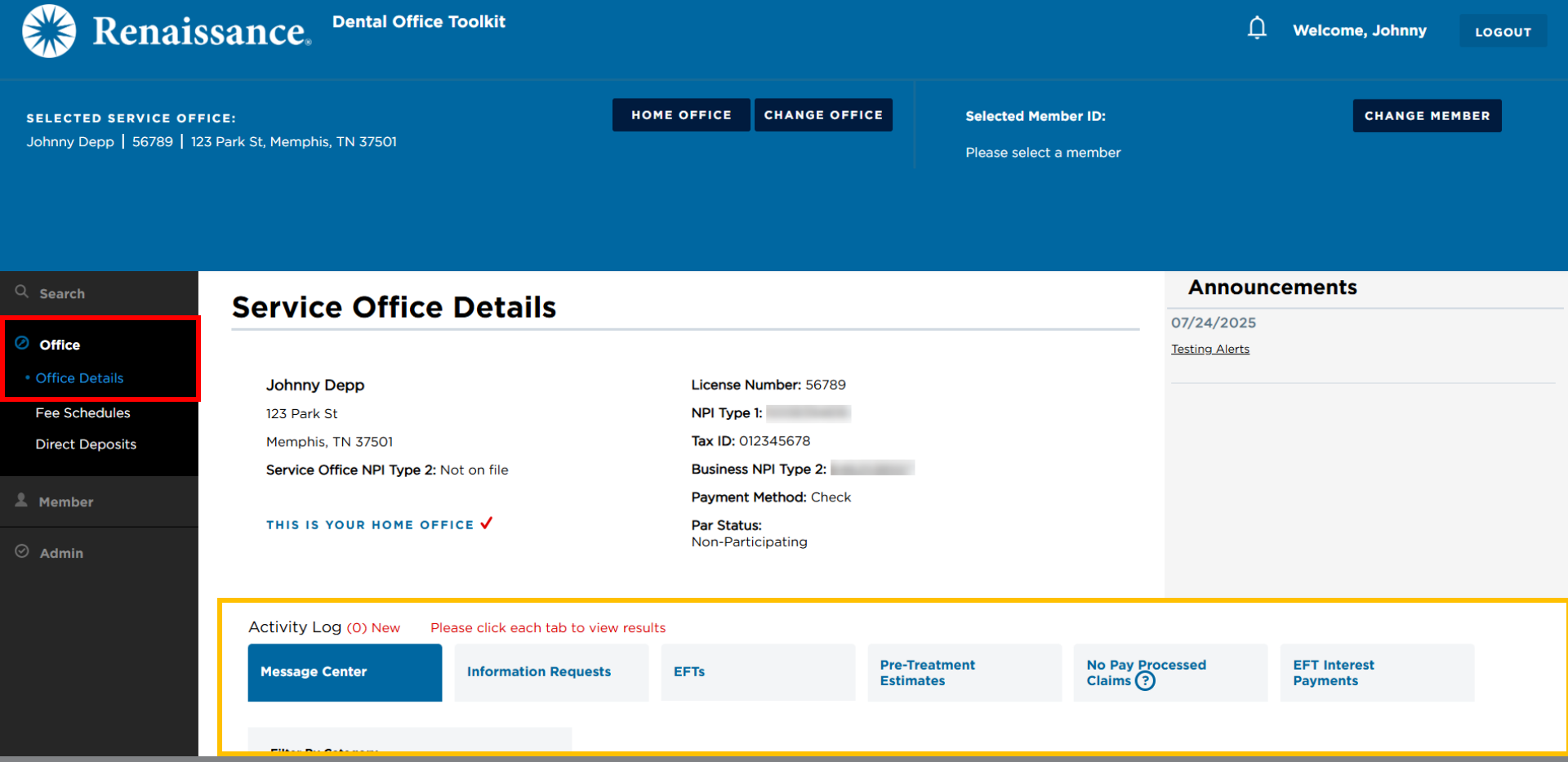
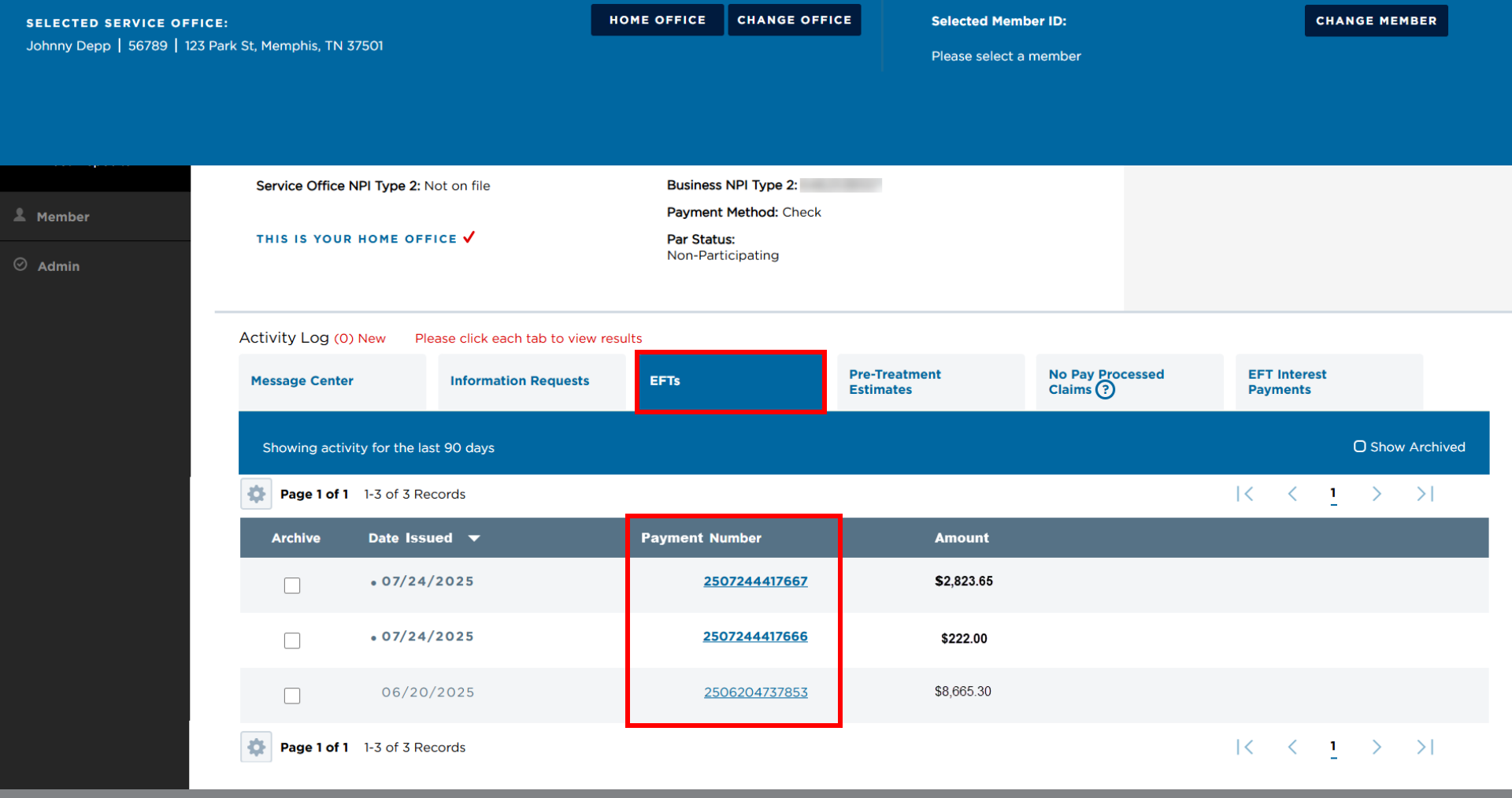
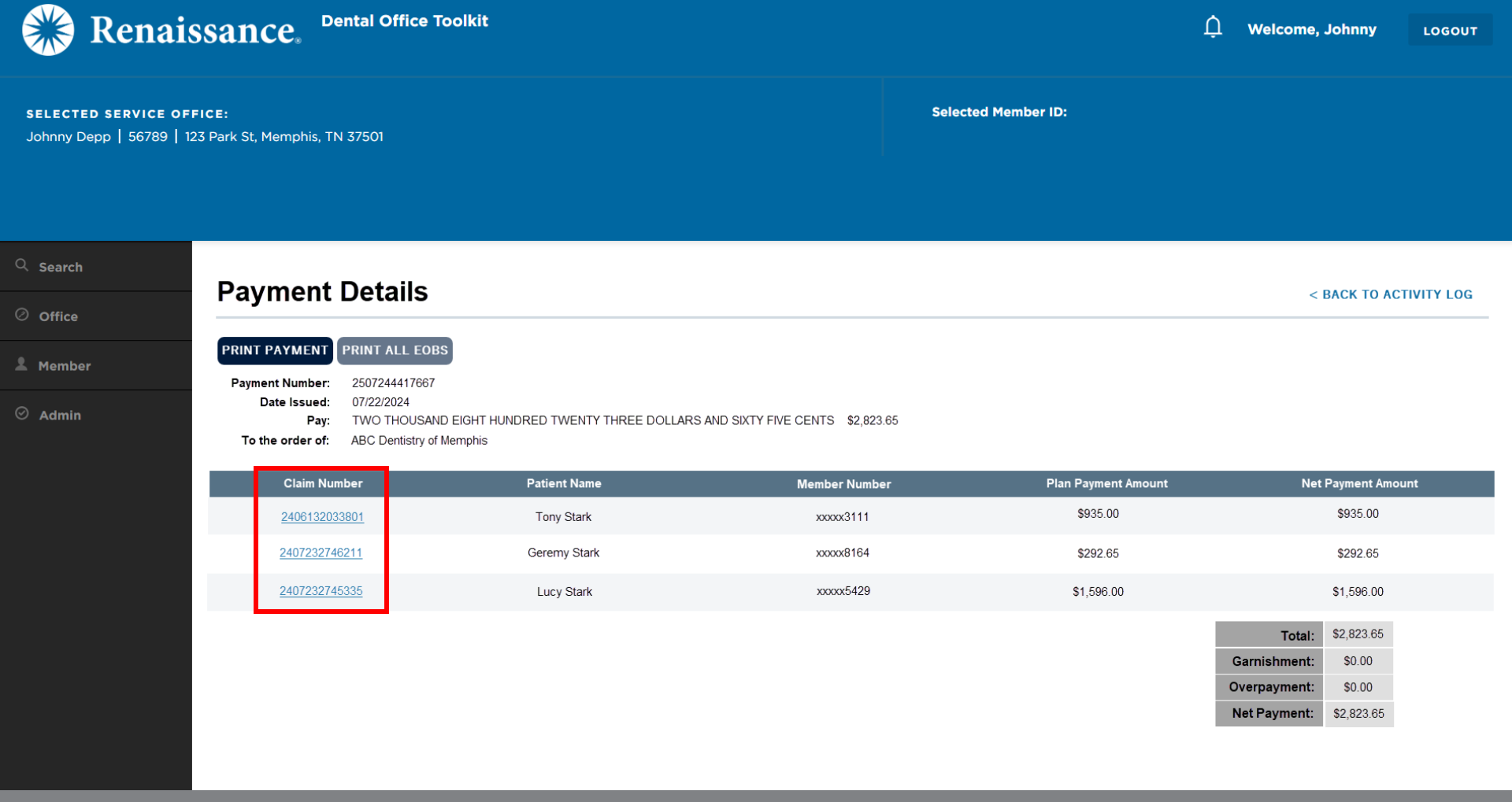
View and Manage EFTs



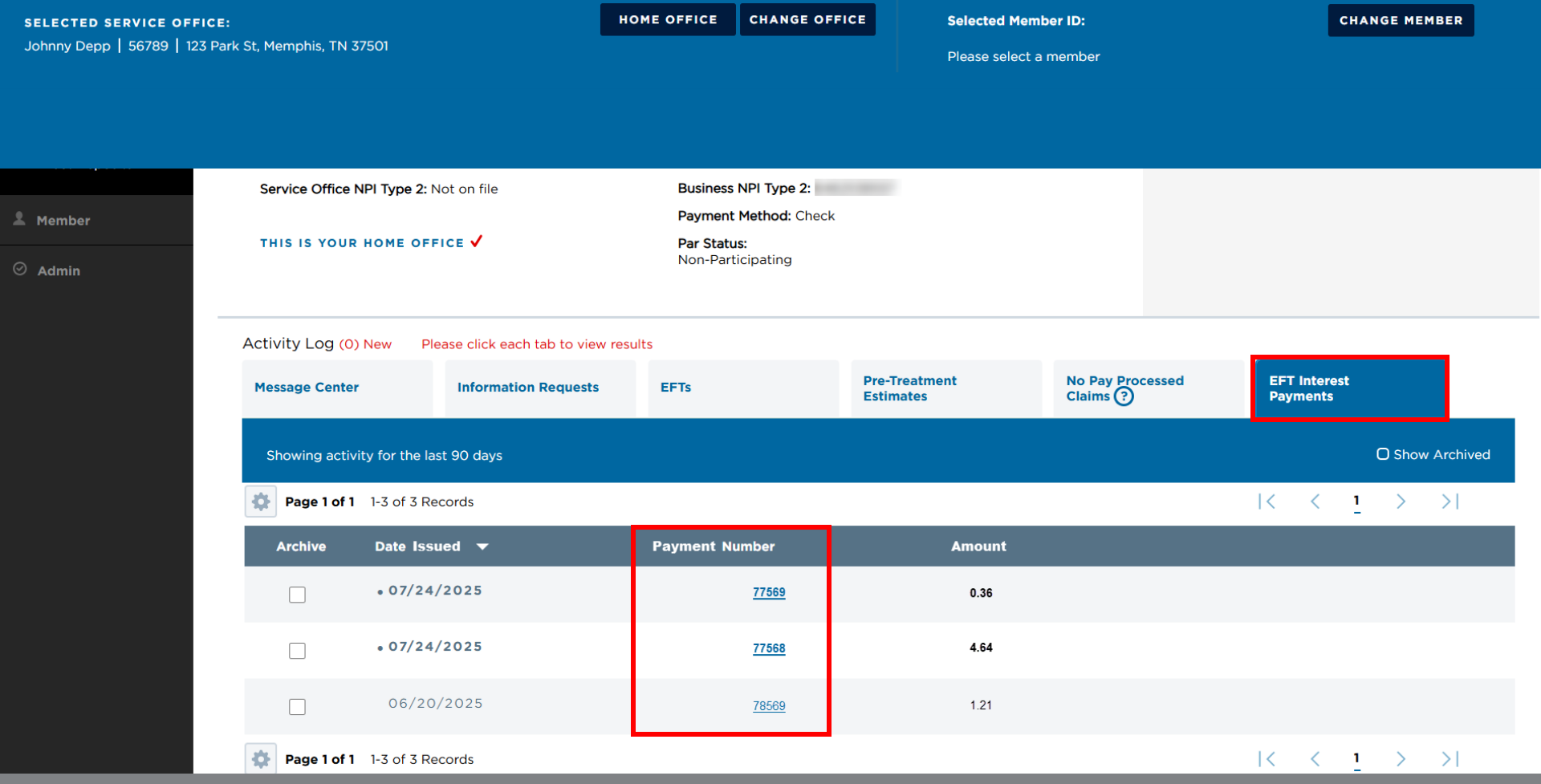
1. Navigate to the “Office” tab on the left-hand navigation bar in red box
2. Click on “Office Details” to view the details of your designated service office
3. View the table at the bottom of the page titled “Activity Log” in yellow box
4. Click on “EFTs” in the blue box



5. View all EFTs
6. To see more details, click on the payment number of the EFT you'd like to view



7. View payment details of the EFT
8. Click on the claim number to view the associated claim



9. To view EFT interest payments, navigate to the tab on the far right of the activity log table
10. To view specific payments, click on the payment number of an EFT interest payment