Standard Broker Onboarding Appointment Process

Purpose

The purpose of this document is to provide detailed instructions to direct brokers and agencies regarding how to submit broker appointment requests. The process outlined in this document is for direct agents, agencies, and standard agency subagents.

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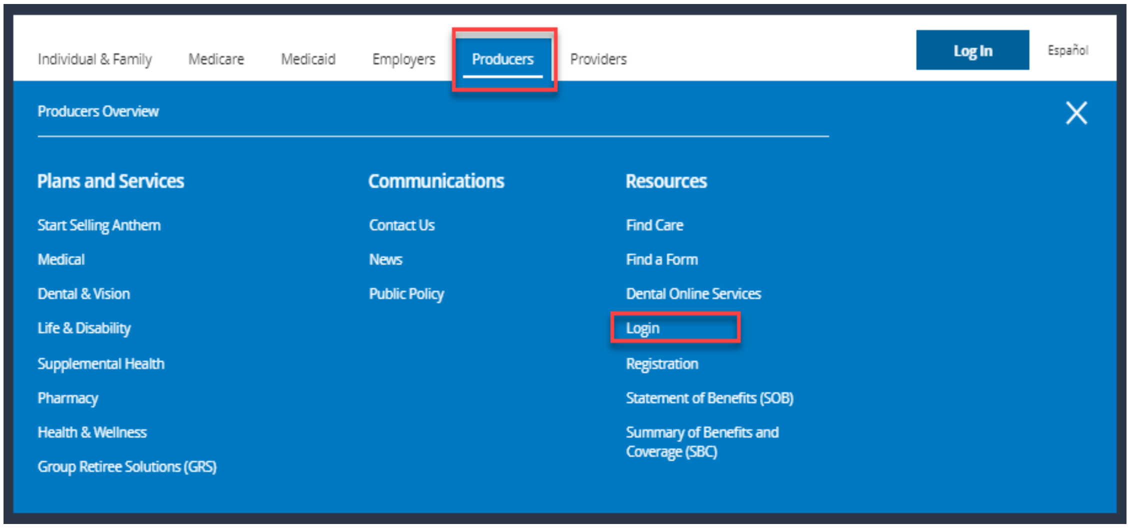
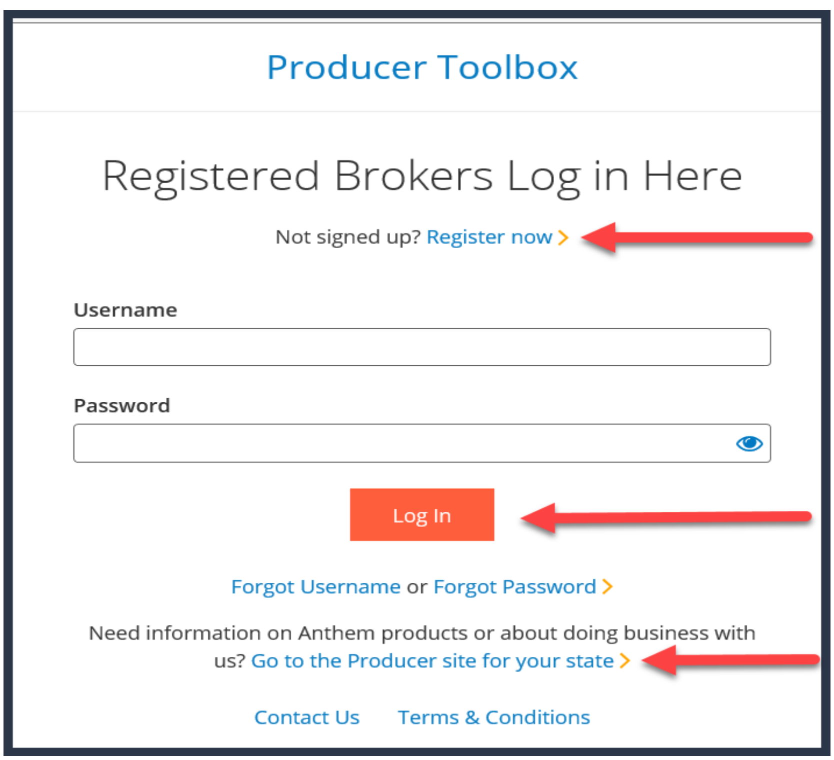
Producer Toolbox Broker Onboarding Process – Standard Broker Onboarding

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Go to Anthem.com, click ‘Producers’ and ‘Login’</td></tr>
<tr><td></td><td>


</td></tr>
<tr><td>2</td><td>Register and/or login</td></tr>
<tr><td></td><td>If you are an existing broker or agency and you have a Producer Toolbox account, enter your username/password and click login</td></tr>
<tr><td></td><td>If you are an existing broker or agency but do not have a Producer Toolbox account, click on register now</td></tr>
<tr><td></td><td>If you are a new broker or agency, click on go to the Producer site for your state</td></tr>
<tr><td></td><td>


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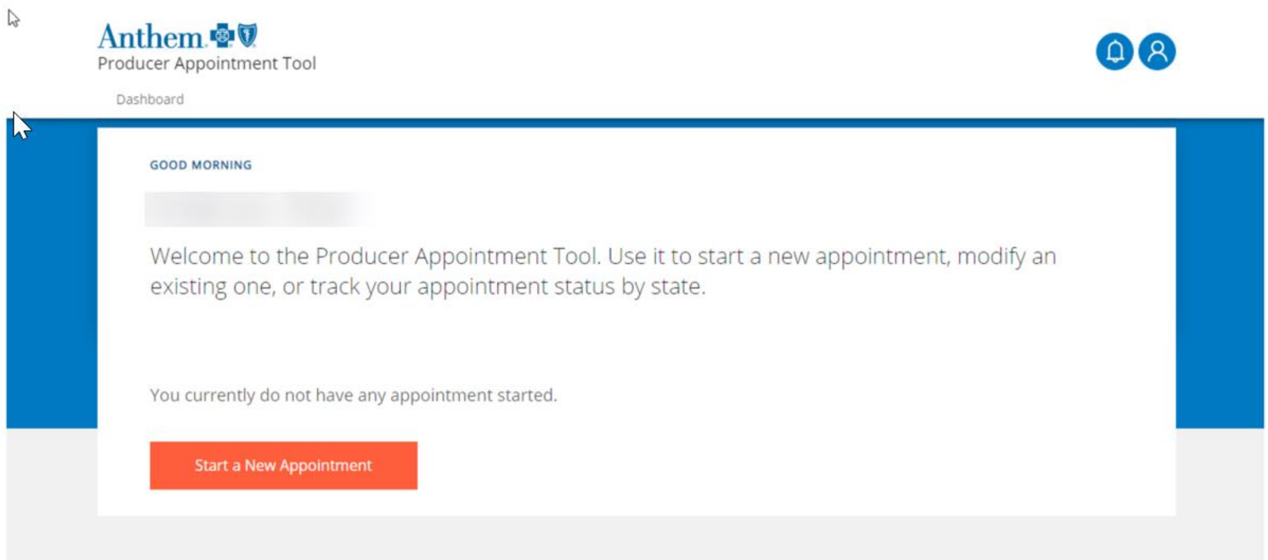
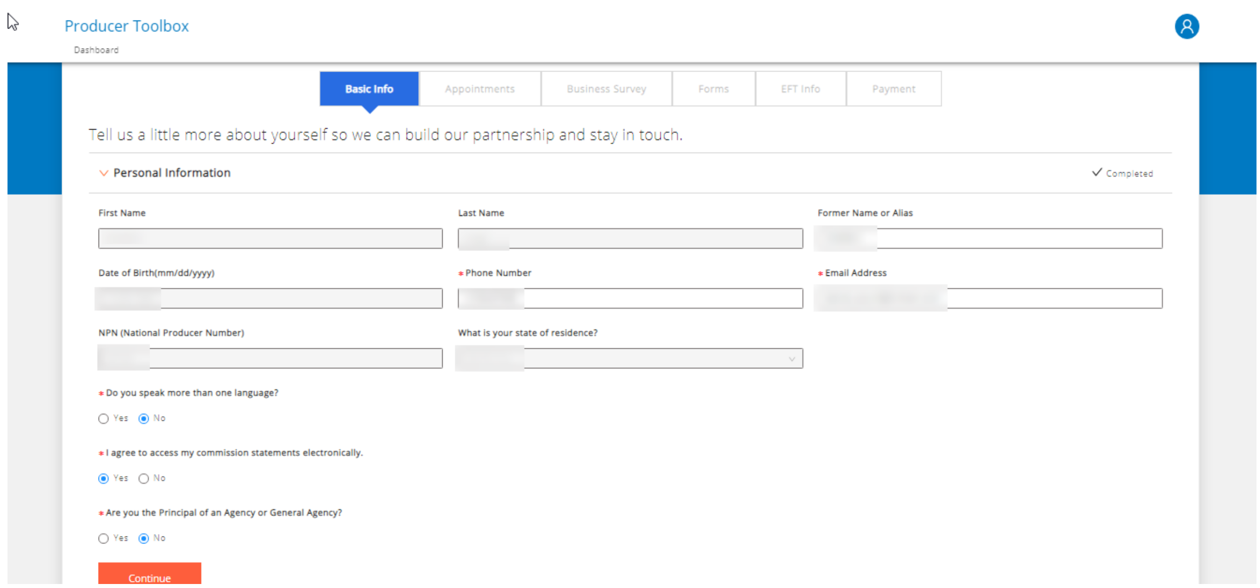
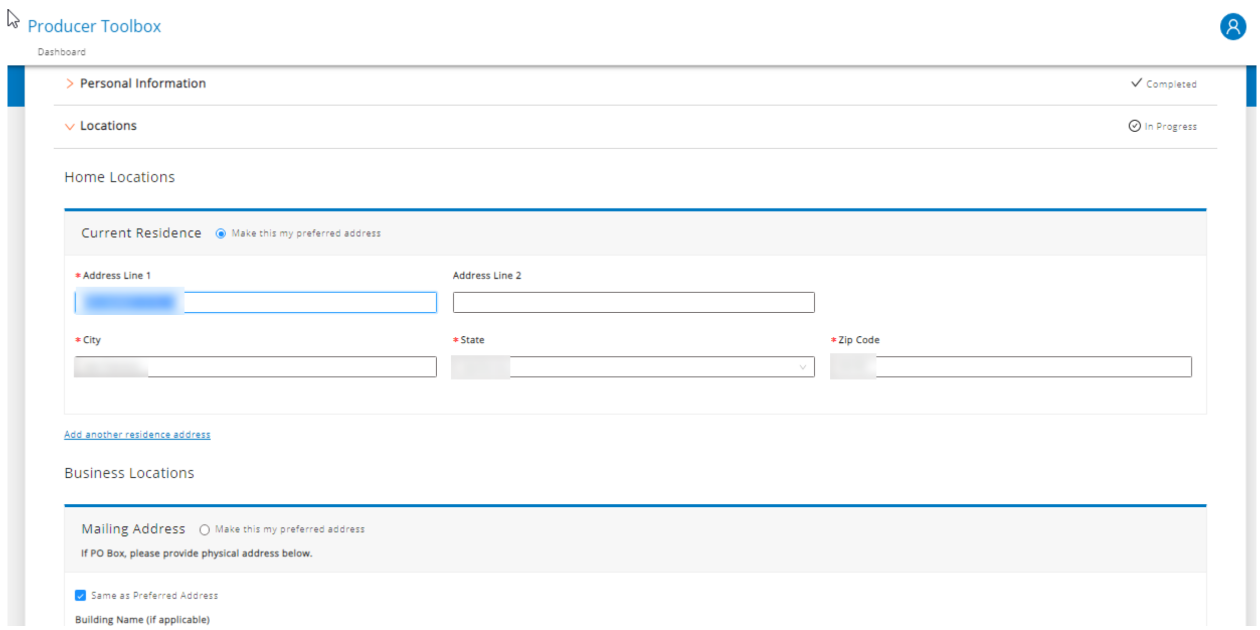
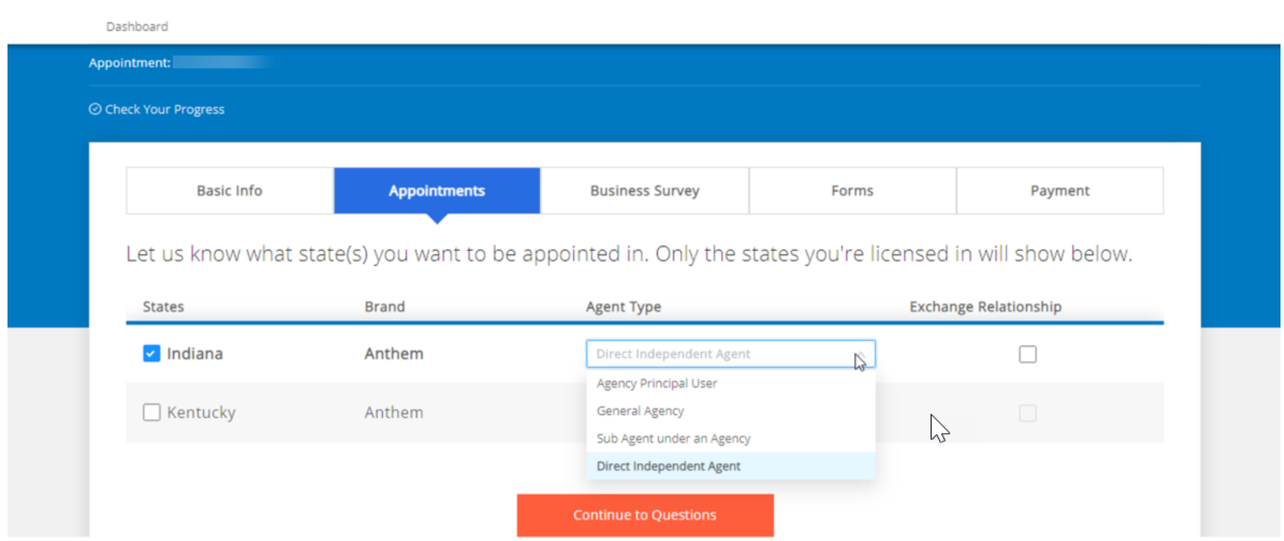
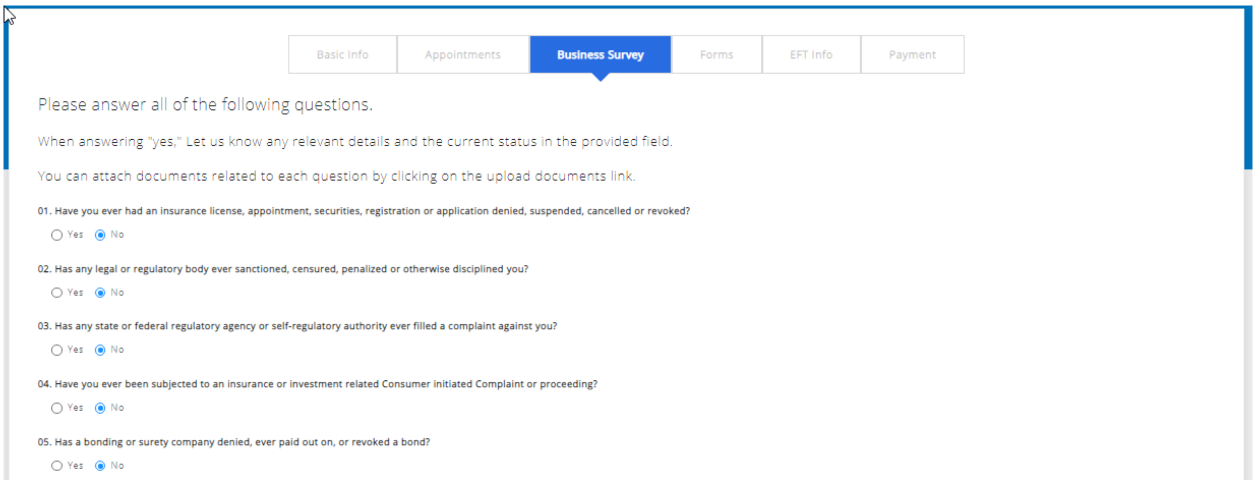
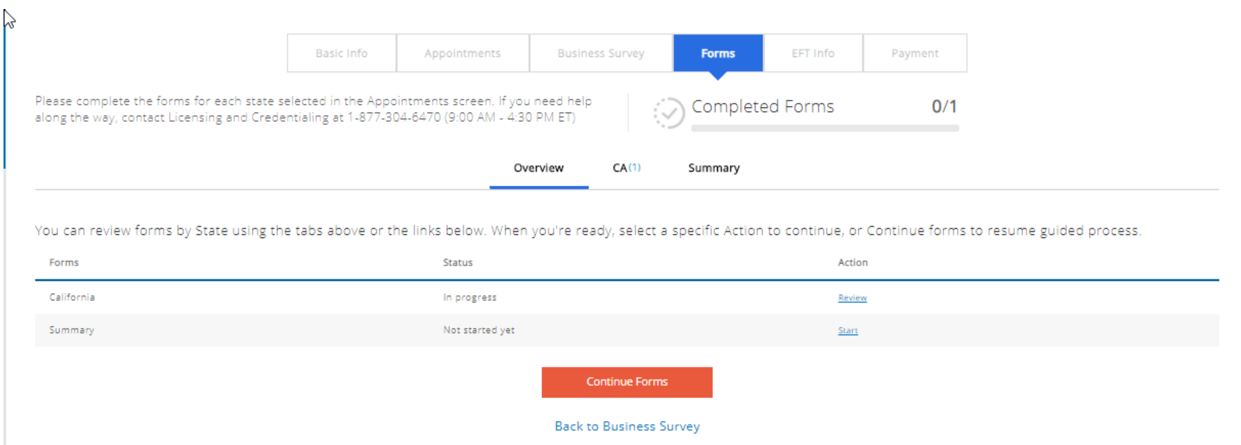
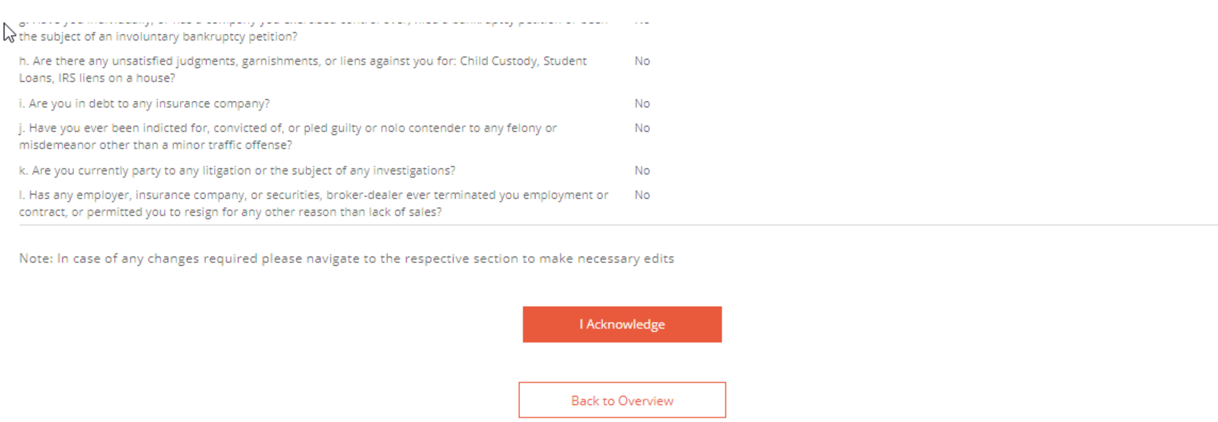
Step	Action
3	Once logged in, click 'Start a New Appointment'
	
4	Enter/update your information in the required fields in the 'Basic Info' section and click 'Continue'
	
5	Enter your address information and click 'Continue to Appointments' when complete

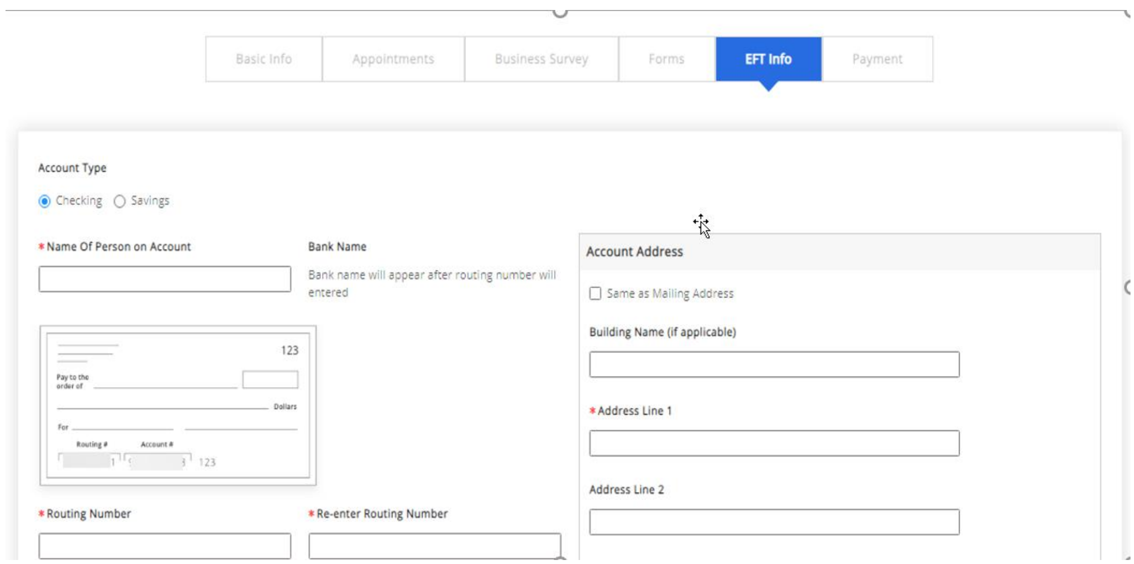
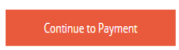
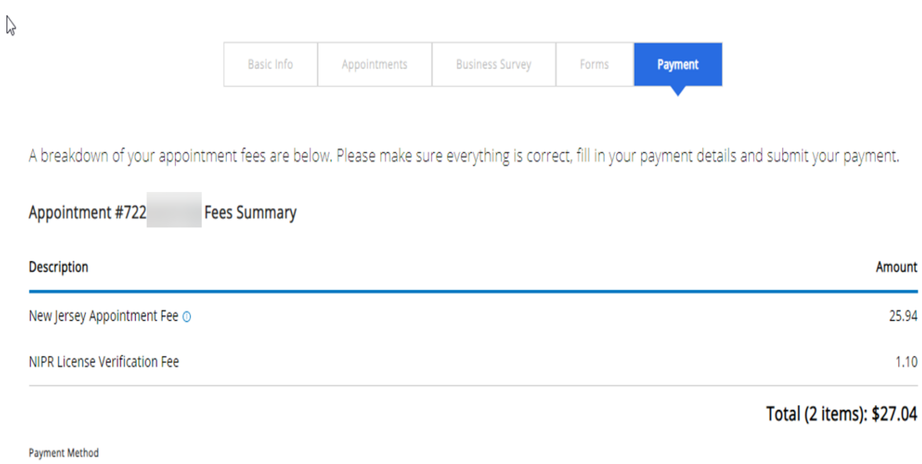
Step	Action
	
6	Click all the state/brand combinations you would like to appointment/contracted in. Select the 'Agent Type/Relationship Type' from the dropdown list for each state/brand selected. Once completed, click 'Continue to Questions'
	
7	Complete the questions in the Business Survey section. Provide any additional information and attach any required documents. Once completed, click 'Continue to Forms'

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>


</td></tr>
<tr><td>8</td><td>Complete all required Forms. Required forms will appear based on requested states and setup.</td></tr>
<tr><td></td><td>


</td></tr>
<tr><td>9</td><td>Click ‘I Acknowledge’ and ‘Back to Overview’ once all forms show completed</td></tr>
<tr><td></td><td>


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Complete Electronic Fund Transfer (EFT Info) if you are paid directly and want to have your commissions deposited directly into your bank account. If you don’t want EFT, prefer commission checks be mailed, or not want to set it up now, click ‘Skip EFT’</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>11</td><td>Click Continue to Payment

</td></tr>
<tr><td>12</td><td>Detailed appointment fee information will appear based on requested state(s) and setup. Enter appointment fee payment information, if applicable, and click ‘Submit Payment’. Appointment fees can now be paid online.</td></tr>
<tr><td></td><td>
</td></tr>
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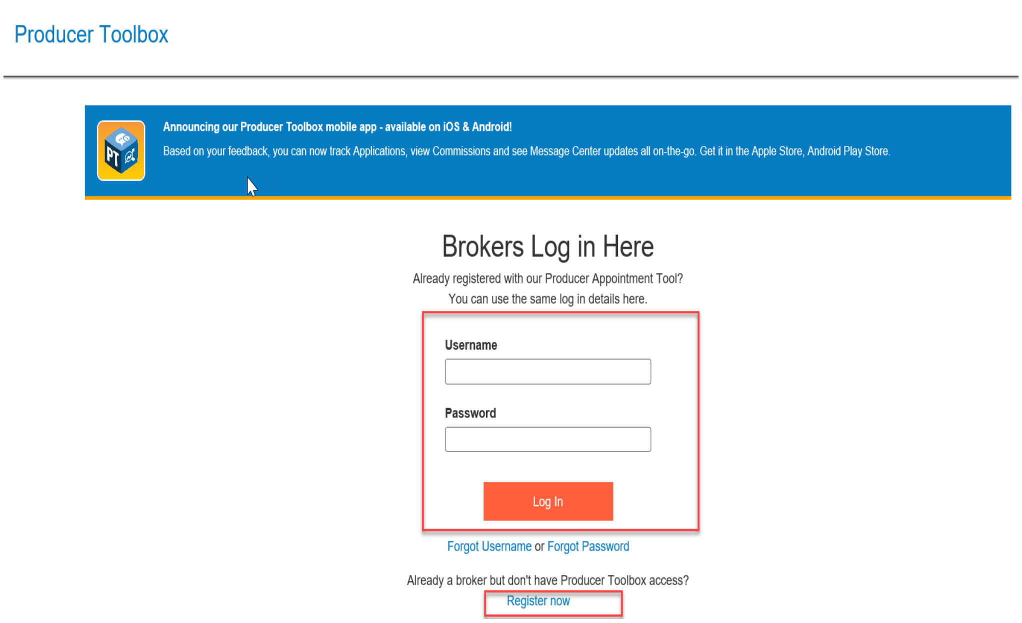
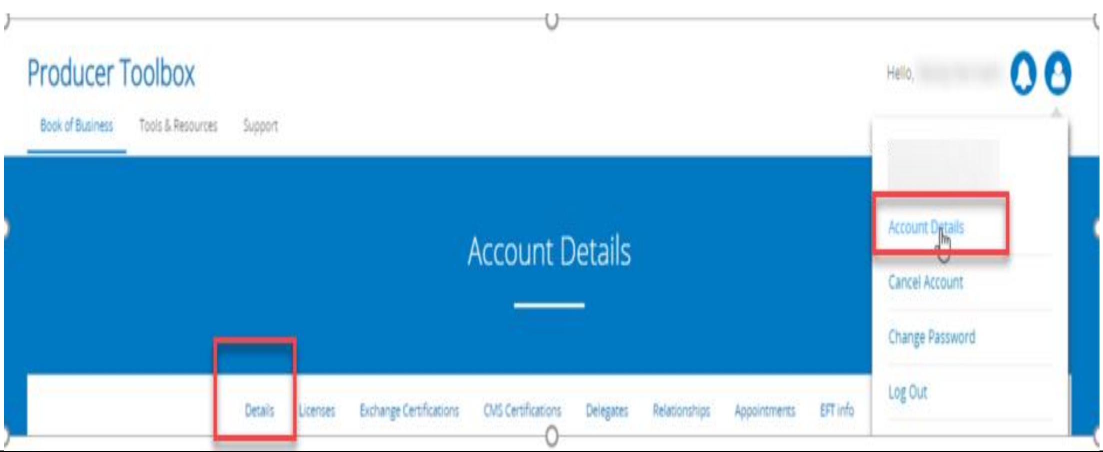
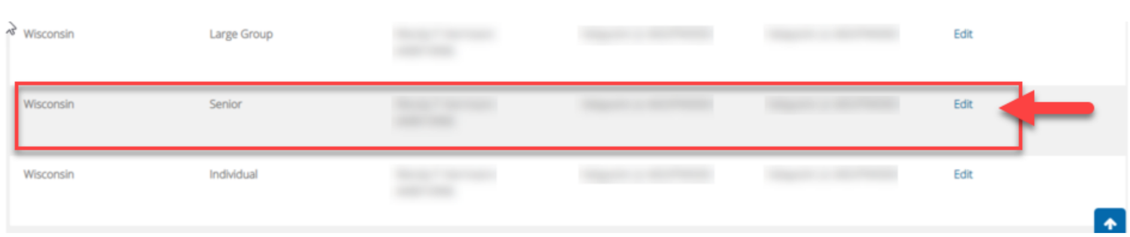
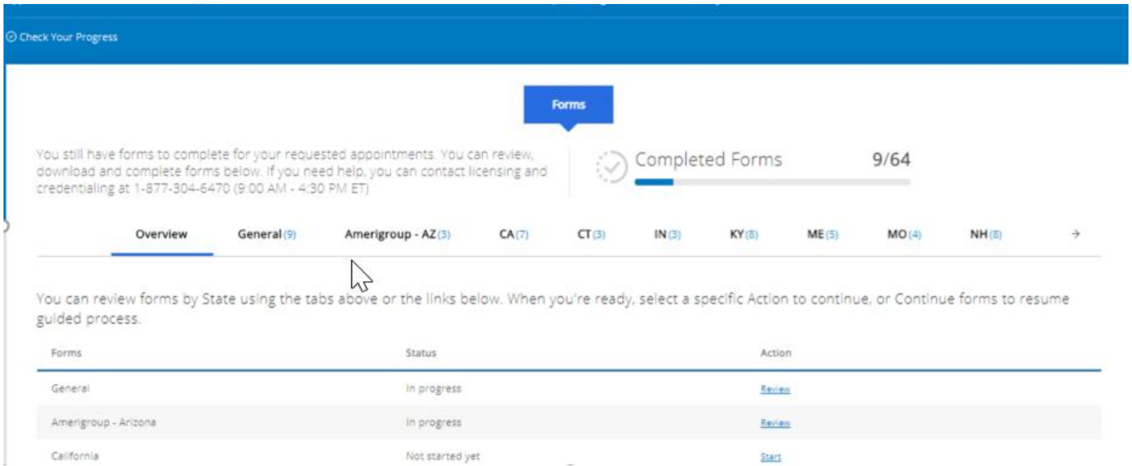
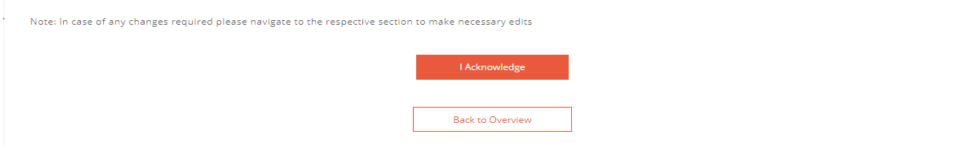
Step	Action
	Broker or Agency Changing an Existing Relationship
1	Log into Producer Toolbox https://brokerportal.anthem.com/apps/ptb/login Register if new to Producer Toolbox or login if existing Producer Toolbox user
	
2	Click the profile icons and 'Account Details' 
3	Scroll down to the appropriate state and relationship combination. Click 'Edit' to change the relationship setup.
	

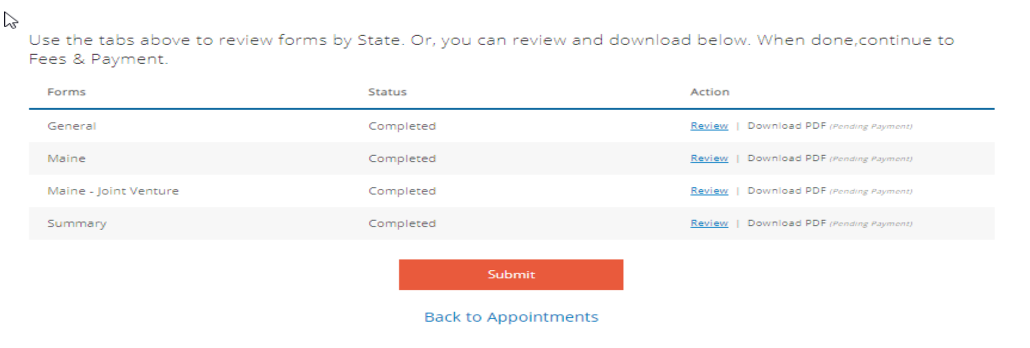
4	Select the desired change. Click ‘Save Changes’
5	Complete any required forms, if applicable, based on the selected change



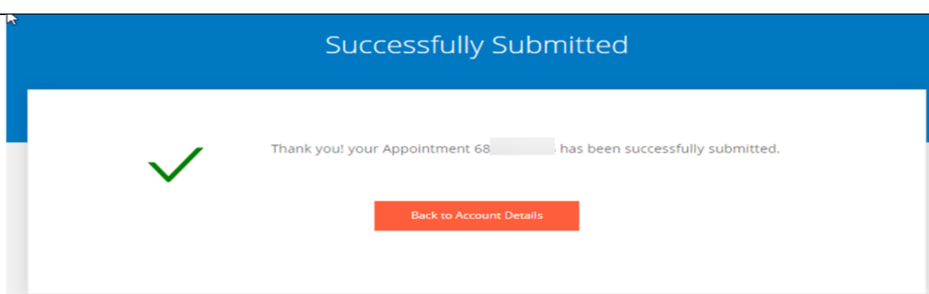
6	Click ‘I Acknowledge’ and ‘Back to Overview’ once all forms show completed

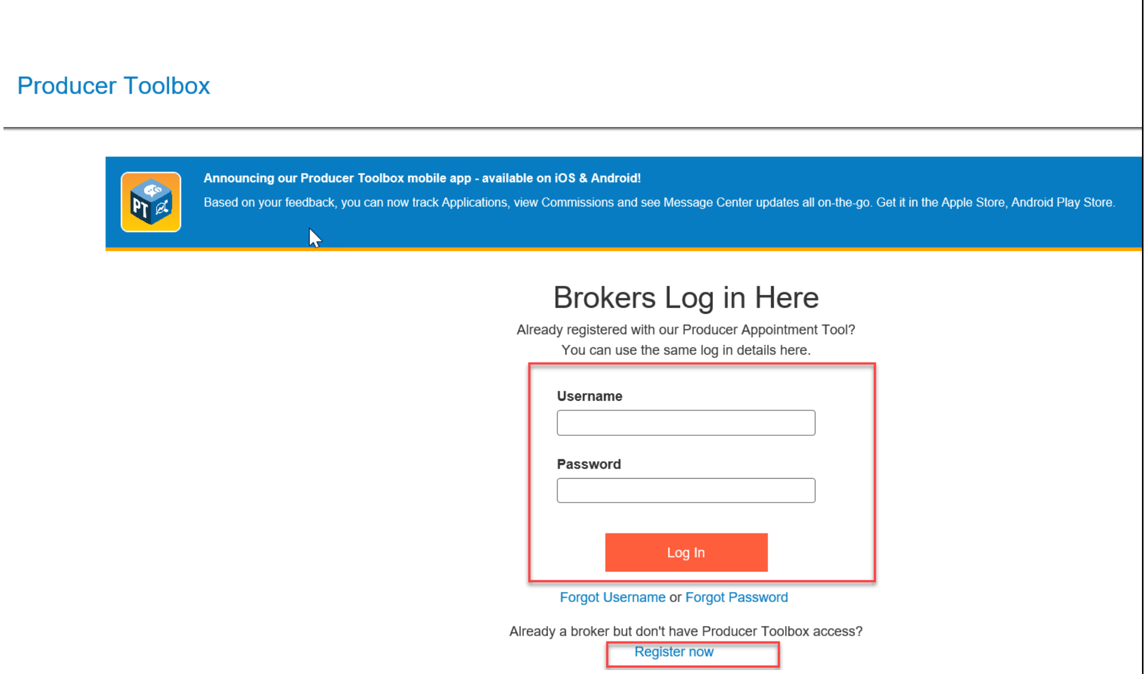
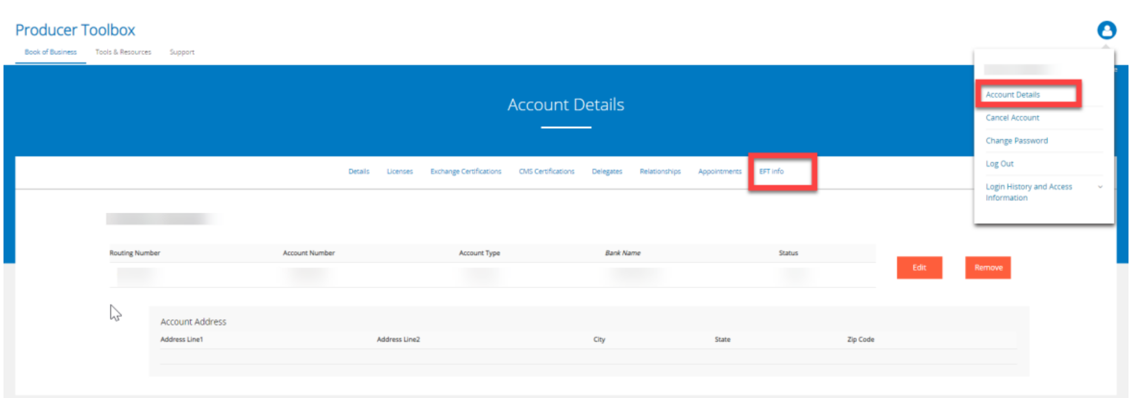


7	Click ‘Submit’



8	A confirmation screen will appear with a button to return to ‘Account Details’



Step	Action
	Existing Agents Adding or Updating Electronic Fund Transfer (EFT)
1	Log into Producer Toolbox https://brokerportal.anthem.com/apps/ptb/login Register if new to Producer Toolbox or log in if existing Producer Toolbox user
	
2	Click the profile icons, ‘Account Details’, ‘EFT info’ - Add, edit, or remove EFT information 
3	Click ‘Save’

Resources

- Contact Licensing & Credentialing by email at anthem.brokers@anthem.com or by phone at 1-877-304-6470 with any questions