

Standard Broker Onboarding Appointment Process

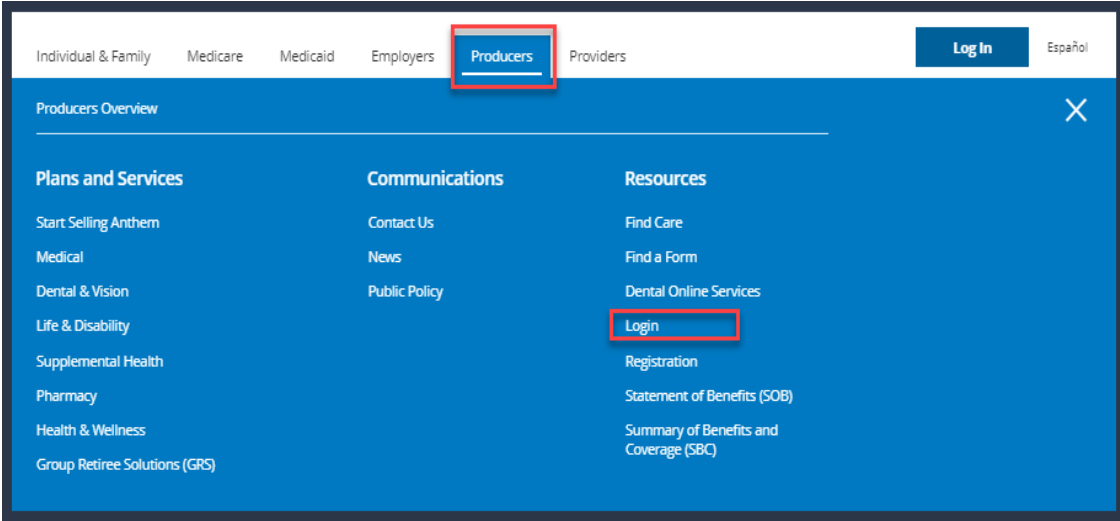
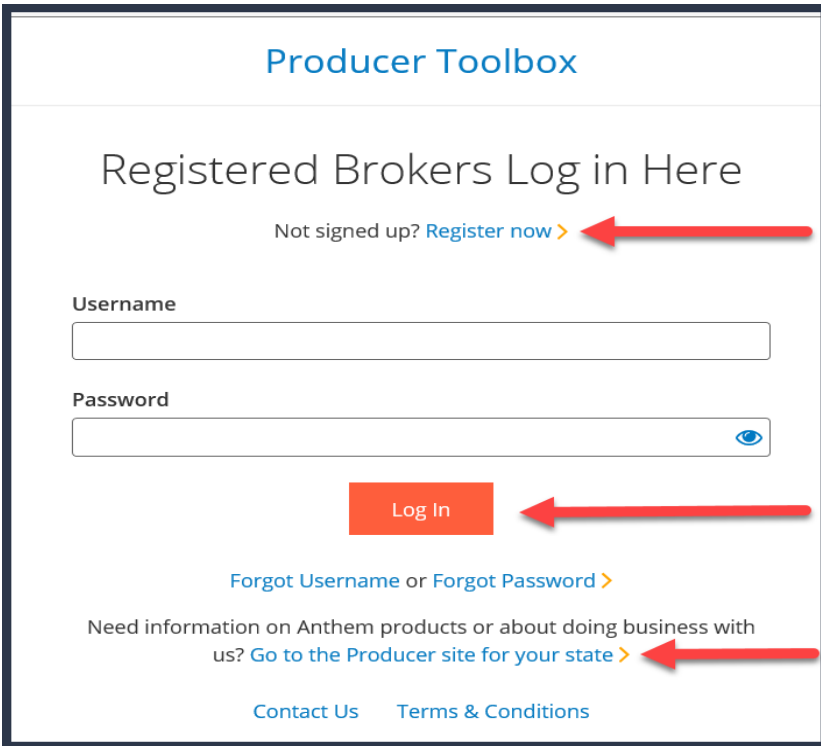
Purpose

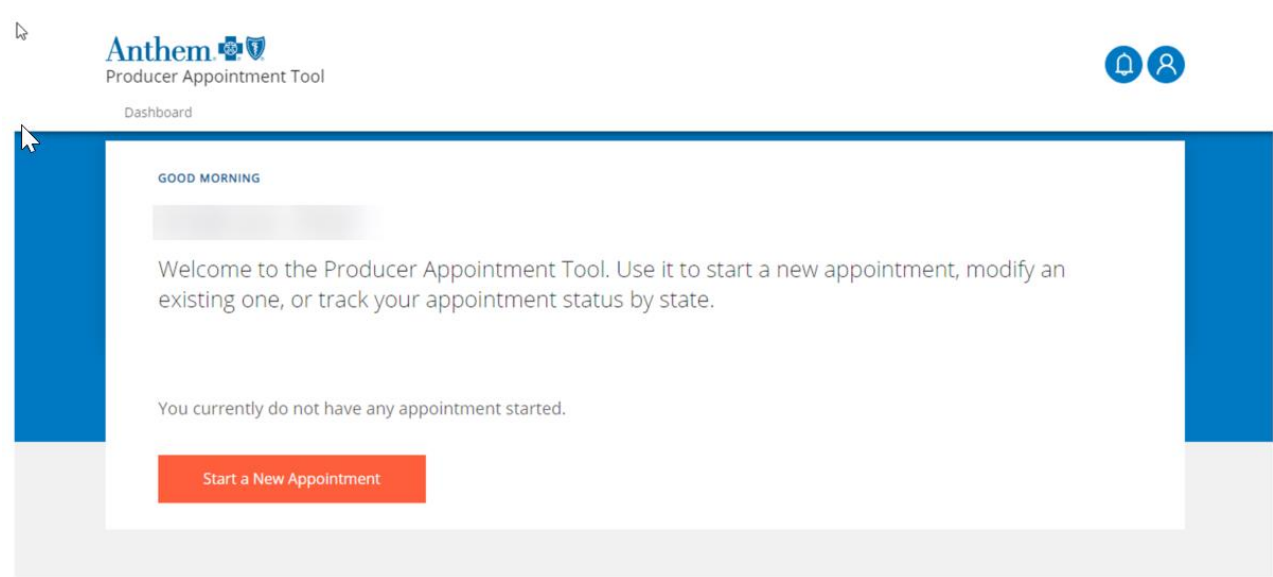
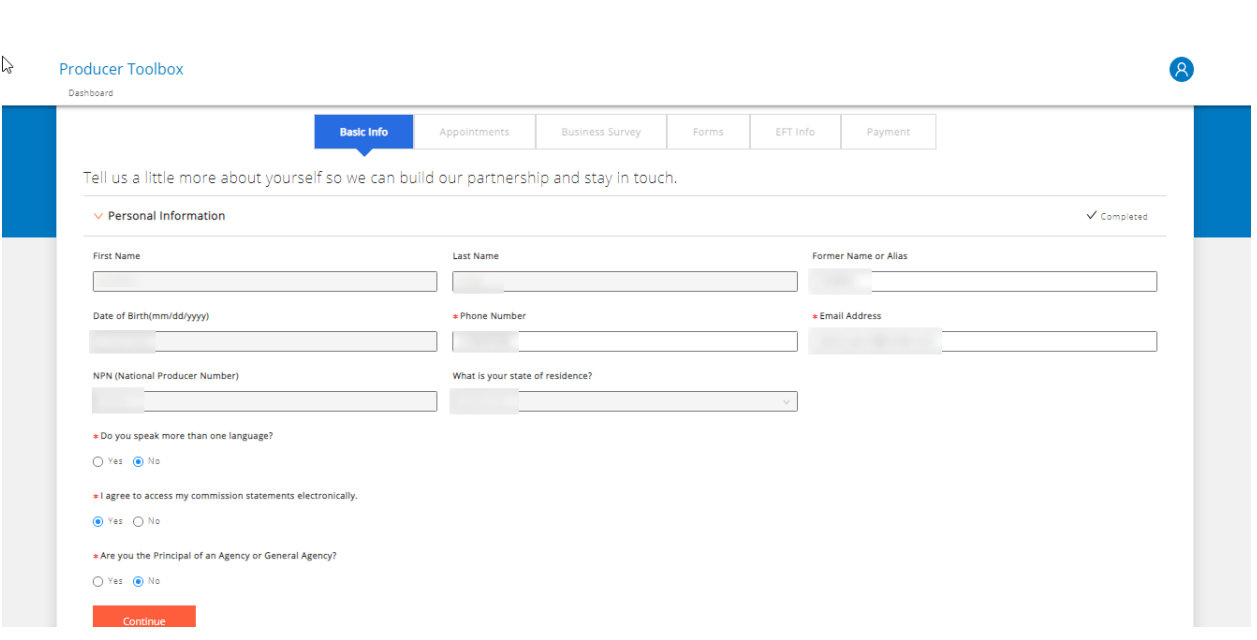
The purpose of this document is to provide detailed instructions to direct brokers and agencies regarding how to submit broker appointment requests. The process outlined in this document is for direct agents, agencies, and standard agency subagents.

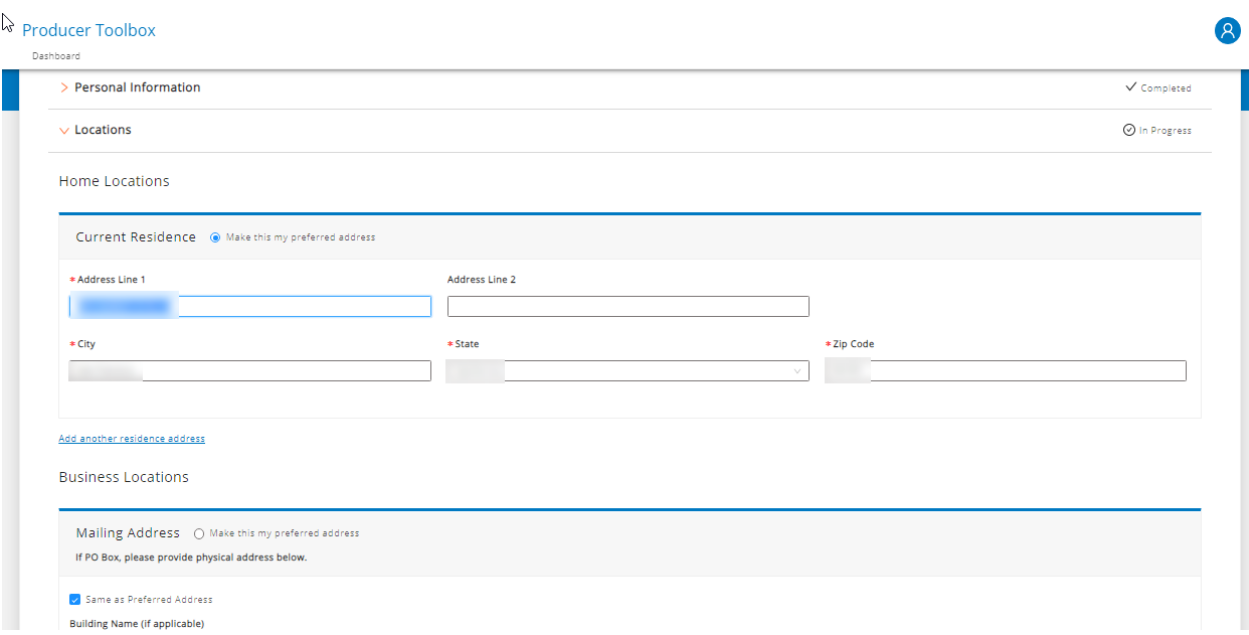
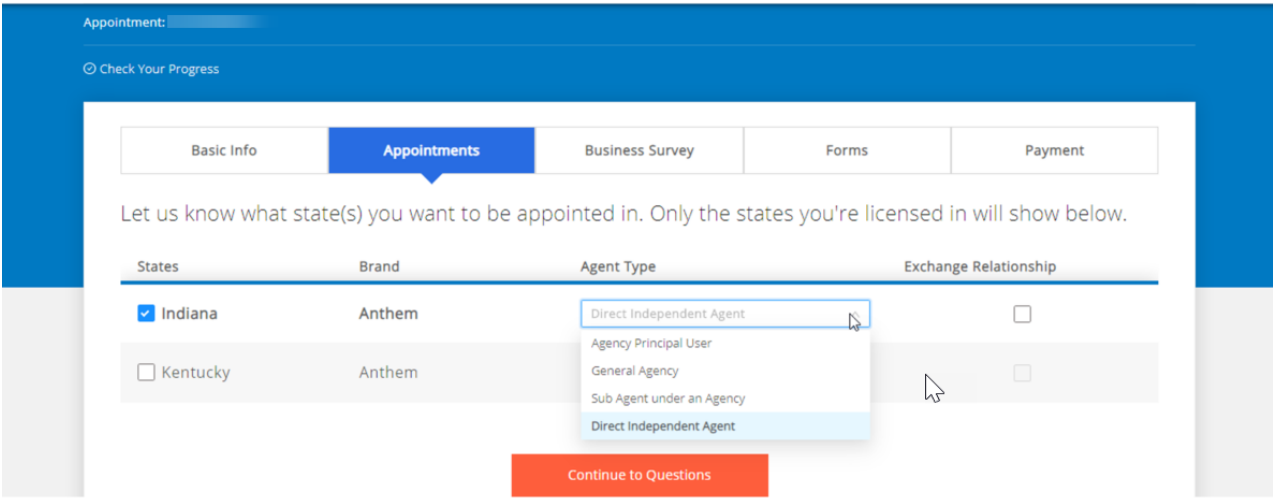
Table of Contents

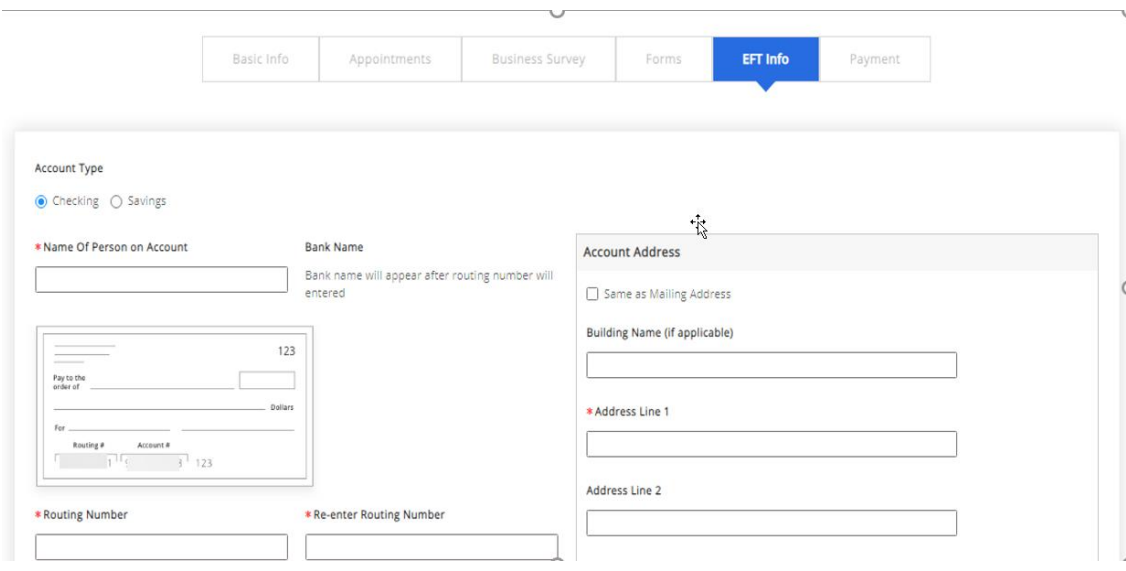
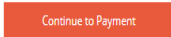
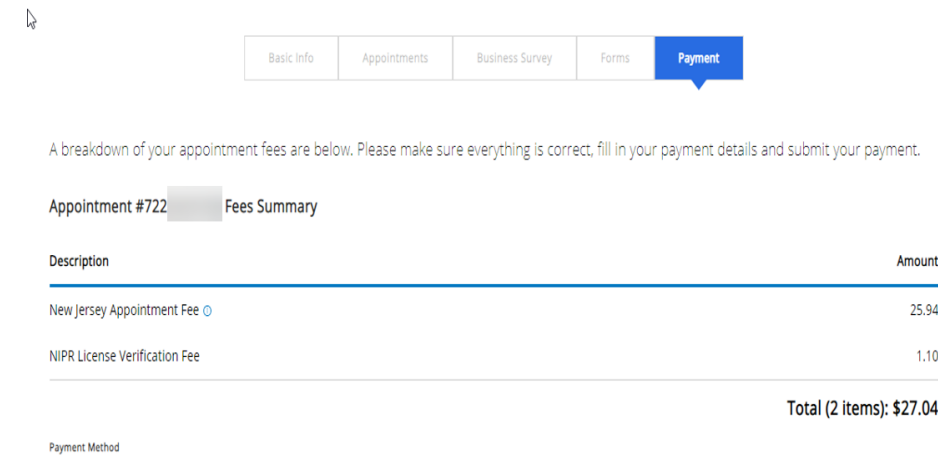
Section		Page
Standard Broker Onboarding Process		
	Logging In	2
	Completing a New Appointment Request and/or Adding a New State to an Existing Agency	3 – 6
	Broker or Agency Changing an Existing Relationship	7 – 8
	Existing Agents Adding or Updating Electronic Fund Transfer (EFT)	9

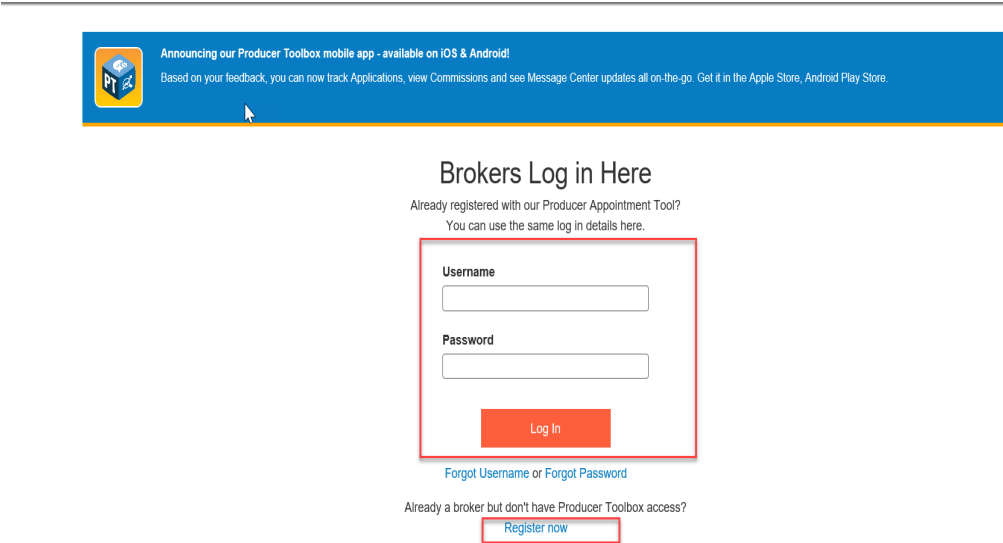
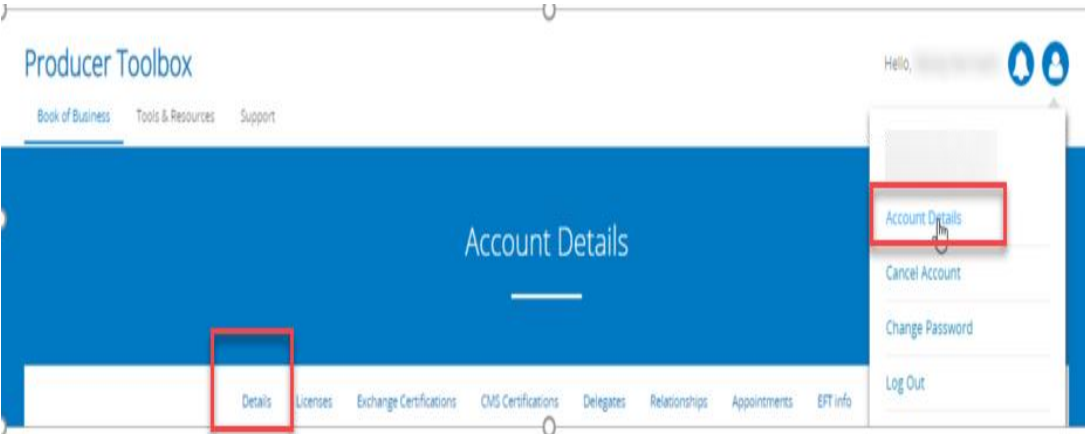
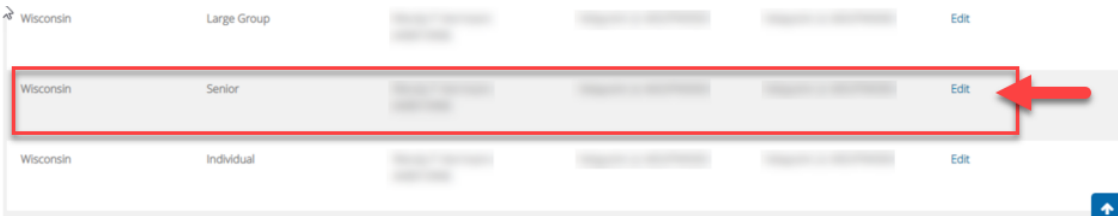
Producer Toolbox Broker Onboarding Process – Standard Broker Onboarding

Step	Action
1	Go to Anthem.com, click 'Producers' and 'Login'
	
2	Register and/or login
	If you are an existing broker or agency and you have a Producer Toolbox account, enter your username/password and click login
	If you are an existing broker or agency but do not have a Producer Toolbox account, click on register now
	If you are a new broker or agency, click on go to the Producer site for your state
	

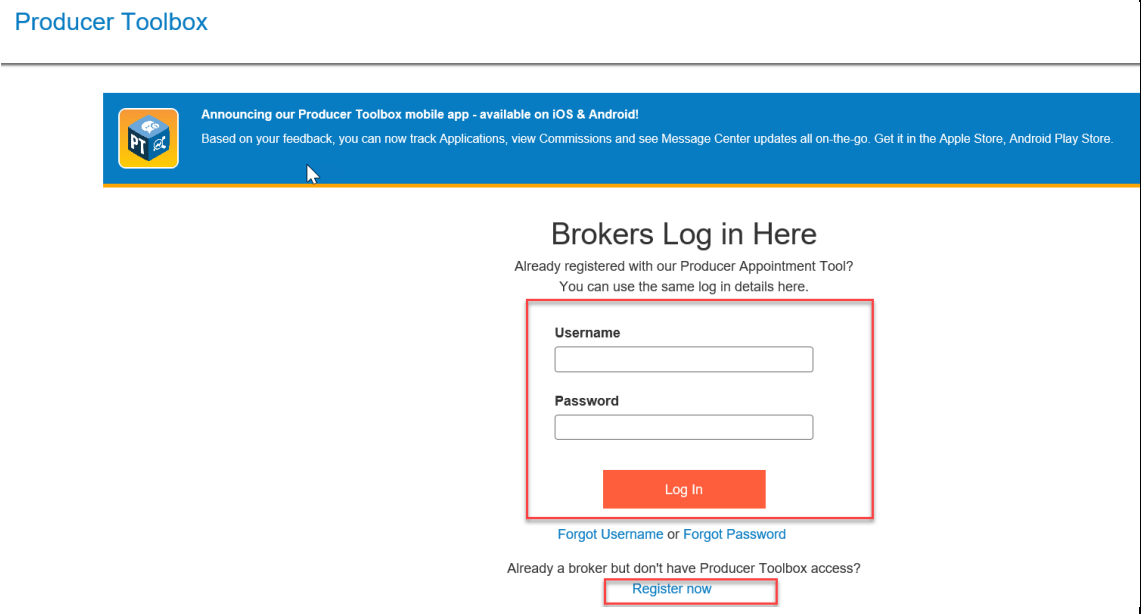
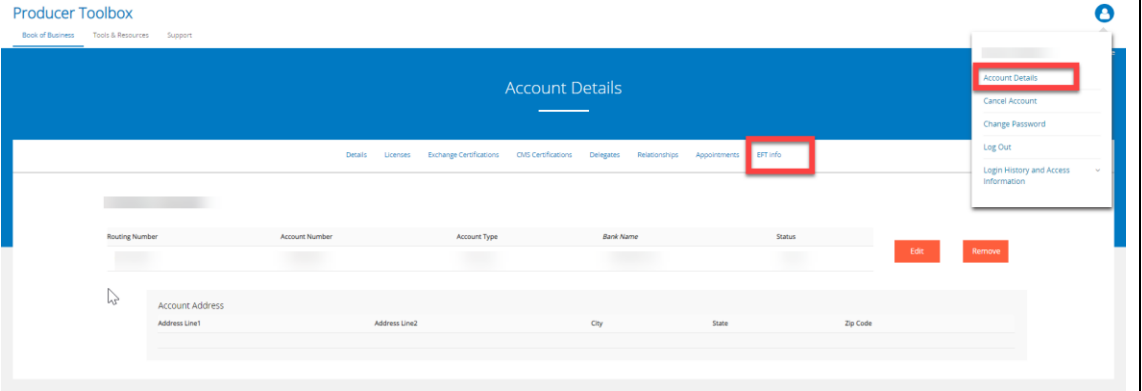
Step	Action
3	Once logged in, click 'Start a New Appointment'
	 The screenshot shows the 'Anthem Producer Appointment Tool' dashboard. At the top, there's a header with the Anthem logo and 'Producer Appointment Tool'. Below that, a 'Dashboard' label is visible. The main content area has a blue sidebar on the left. The central white area contains a 'GOOD MORNING' greeting, a blurred name, a welcome message: 'Welcome to the Producer Appointment Tool. Use it to start a new appointment, modify an existing one, or track your appointment status by state.', and a status message: 'You currently do not have any appointment started.' At the bottom of this central area is a prominent red button labeled 'Start a New Appointment'.
4	Enter/update your information in the required fields in the 'Basic Info' section and click 'Continue'
	 The screenshot shows the 'Producer Toolbox' interface. The 'Basic Info' tab is selected in the top navigation bar. Below the navigation bar, there's a section titled 'Tell us a little more about yourself so we can build our partnership and stay in touch.' with a 'Completed' status indicator. The 'Personal Information' section contains several form fields: 'First Name', 'Last Name', 'Former Name or Alias', 'Date of Birth (mm/dd/yyyy)', 'Phone Number', 'Email Address', 'NPN (National Producer Number)', and 'What is your state of residence?'. There are also three checkboxes: 'Do you speak more than one language?' (Yes/No), 'I agree to access my commission statements electronically.' (Yes/No), and 'Are you the Principal of an Agency or General Agency?' (Yes/No). A red 'Continue' button is at the bottom of the form.
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'

Step	Action								
10	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'								
									
11	Click Continue to Payment 								
12	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.								
	 <table border="1"> <thead> <tr> <th>Description</th><th>Amount</th></tr> </thead> <tbody> <tr> <td>New Jersey Appointment Fee</td><td>25.94</td></tr> <tr> <td>NIPR License Verification Fee</td><td>1.10</td></tr> <tr> <td>Total (2 items):</td><td>\$27.04</td></tr> </tbody> </table>	Description	Amount	New Jersey Appointment Fee	25.94	NIPR License Verification Fee	1.10	Total (2 items):	\$27.04
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New Jersey Appointment Fee	25.94								
NIPR License Verification Fee	1.10								
Total (2 items):	\$27.04								

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
	Producer Toolbox 
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															
	Check Your Progress Forms You still have forms to complete for your requested appointments. You can review, download and complete forms below. If you need help, you can contact licensing and credentialing at 1-877-304-6470 (9:00 AM - 4:30 PM ET) Completed Forms 9/64 Overview General (9) Amerigroup - AZ (3) CA (7) CT (3) IN (3) KY (8) ME (5) MO (4) NH (8) → You can review forms by State using the tabs above or the links below. When you're ready, select a specific Action to continue, or Continue forms to resume guided process. <table><thead><tr><th>Forms</th><th>Status</th><th>Action</th></tr></thead><tbody><tr><td>General</td><td>In progress</td><td>Review</td></tr><tr><td>Amerigroup - Arizona</td><td>In progress</td><td>Review</td></tr><tr><td>California</td><td>Not started yet</td><td>Start</td></tr></tbody></table>	Forms	Status	Action	General	In progress	Review	Amerigroup - Arizona	In progress	Review	California	Not started yet	Start			
Forms	Status	Action														
General	In progress	Review														
Amerigroup - Arizona	In progress	Review														
California	Not started yet	Start														
6	Click 'I Acknowledge' and 'Back to Overview' once all forms show completed															
	Note: In case of any changes required please navigate to the respective section to make necessary edits I Acknowledge Back to Overview															
7	Click 'Submit'															
	Use the tabs above to review forms by State. Or, you can review and download below. When done,continue to Fees & Payment. <table><thead><tr><th>Forms</th><th>Status</th><th>Action</th></tr></thead><tbody><tr><td>General</td><td>Completed</td><td>Review Download PDF (Pending Payment)</td></tr><tr><td>Maine</td><td>Completed</td><td>Review Download PDF (Pending Payment)</td></tr><tr><td>Maine - Joint Venture</td><td>Completed</td><td>Review Download PDF (Pending Payment)</td></tr><tr><td>Summary</td><td>Completed</td><td>Review Download PDF (Pending Payment)</td></tr></tbody></table> Submit Back to Appointments	Forms	Status	Action	General	Completed	Review Download PDF (Pending Payment)	Maine	Completed	Review Download PDF (Pending Payment)	Maine - Joint Venture	Completed	Review Download PDF (Pending Payment)	Summary	Completed	Review Download PDF (Pending Payment)
Forms	Status	Action														
General	Completed	Review Download PDF (Pending Payment)														
Maine	Completed	Review Download PDF (Pending Payment)														
Maine - Joint Venture	Completed	Review Download PDF (Pending Payment)														
Summary	Completed	Review Download PDF (Pending Payment)														
8	A confirmation screen will appear with a button to return to 'Account Details'															
	Successfully Submitted ✓ Thank you! your Appointment 68 [redacted] has been successfully submitted. Back 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