# FMO, EMO, MGA Broker Onboarding Appointment Process

## Purpose

The purpose of this document is to provide detailed instructions to FMO, EMO, and MGA agencies regarding how to submit broker appointment requests. The process outlined in this document is specifically how the broker will complete their potion of the appointment request initiated by the FMO, EMO, and MGA agencies.

## Table of Contents



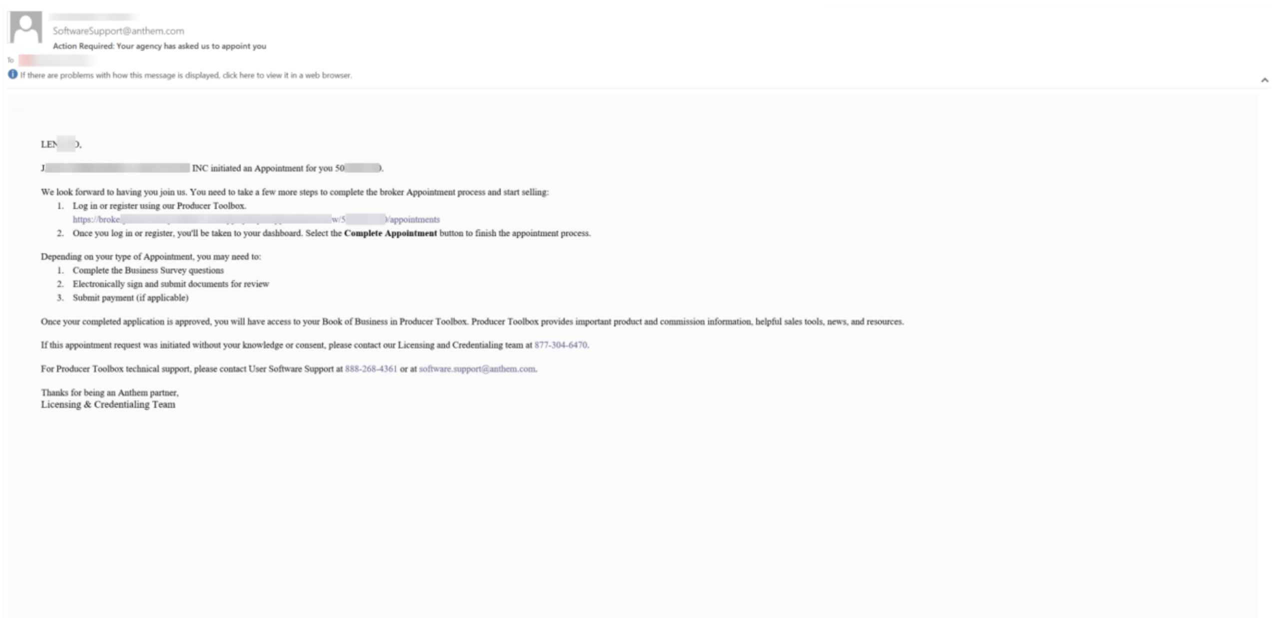
## Browser Requirements:

- Internet Explorer = version 11 or above
- Chrome = version 83 or above
- Firefox = version 77 or above
- Safari = version 13 or above
- Edge = version 80 or above
- Opera = version 68 or above

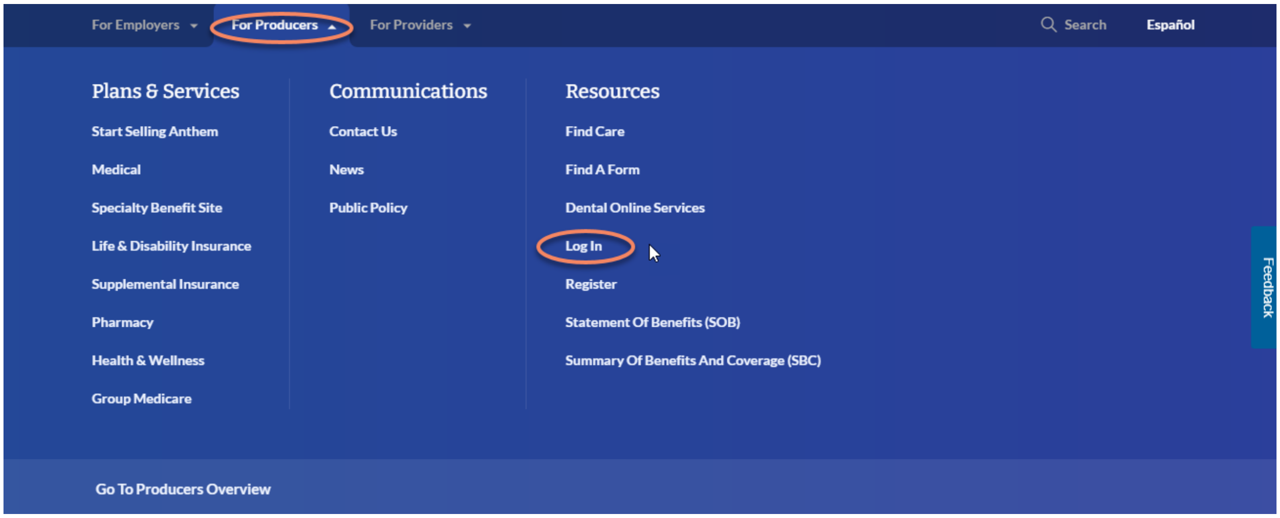
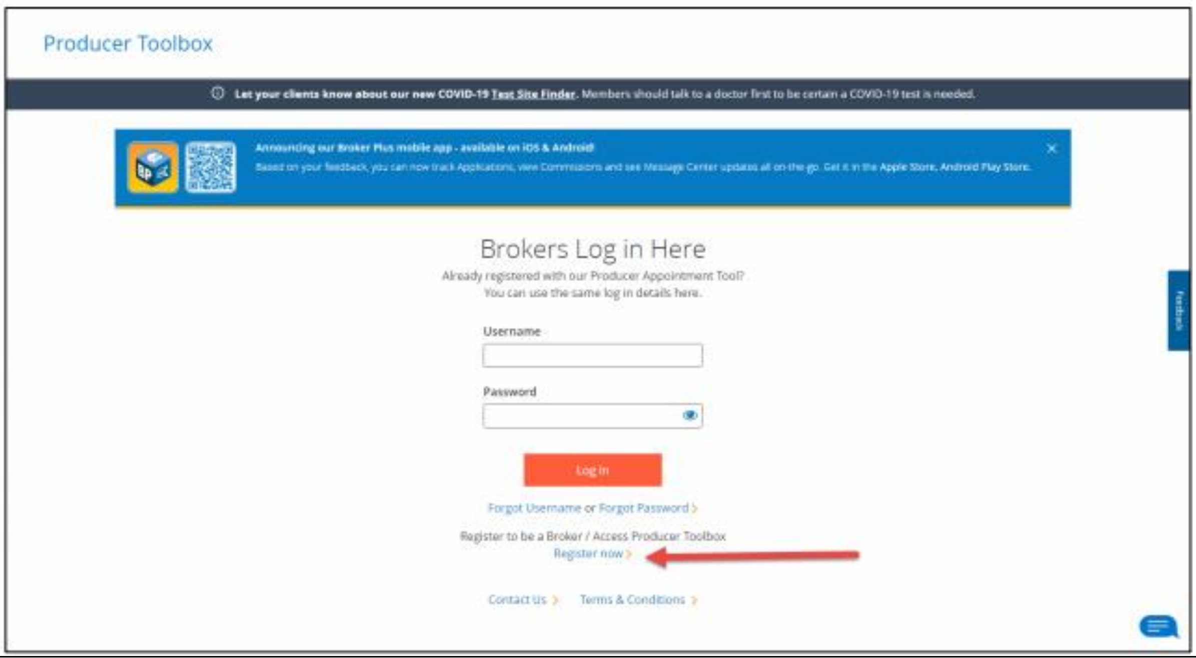
## Resources:

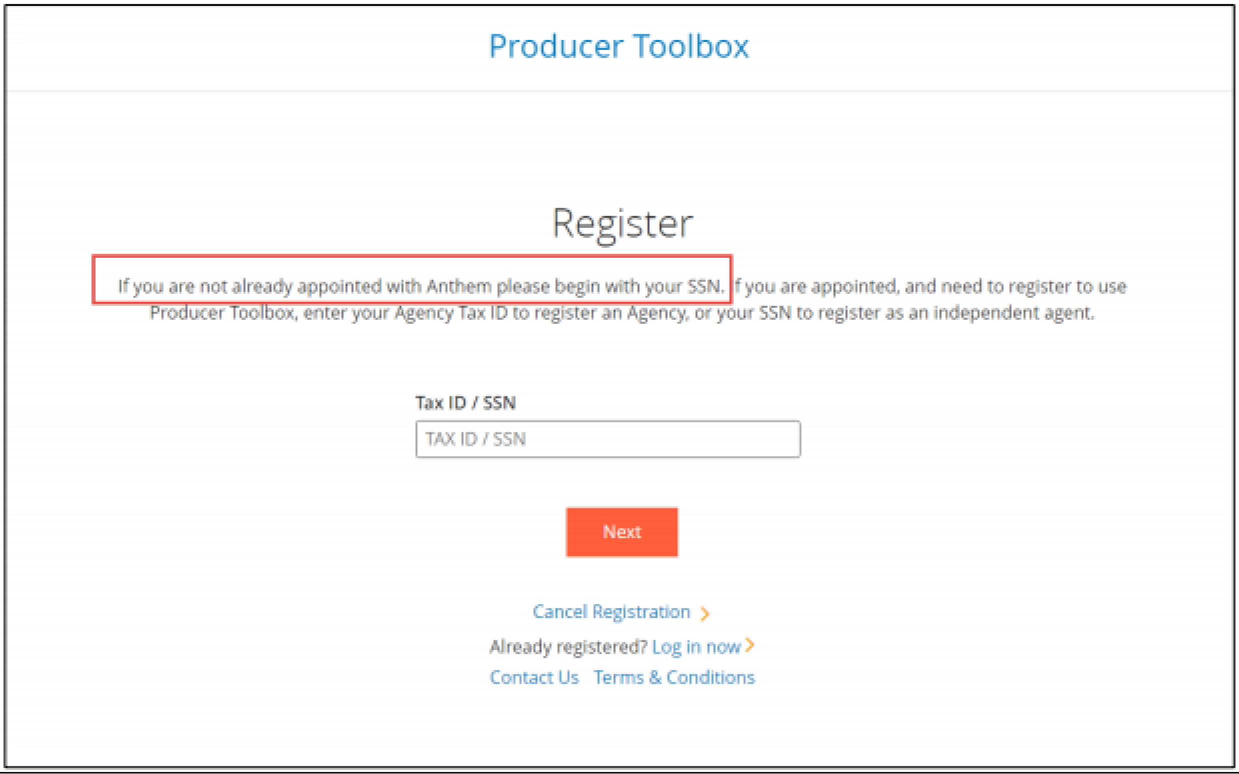
- Contact Licensing & Credentialing by email at anthem.brokers@anthem.com or by phone at 1-877-304-6470, select option 2.
- Tech Support – email to software.support@anthem.com or by phone at 888-268-4361.

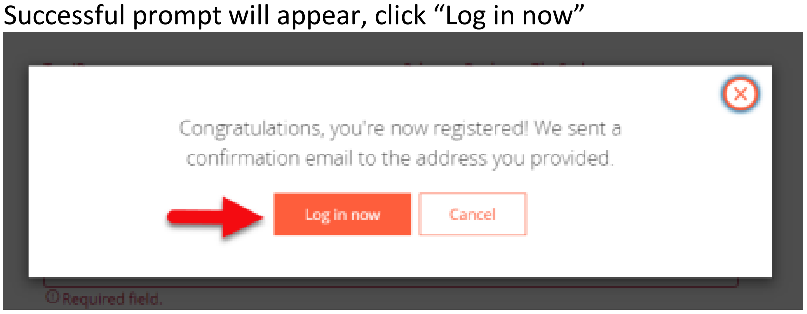
# Producer Toolbox Broker Onboarding - Agency Admin Process

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">Logging In/Creating an Account</td></tr>
<tr><td>1</td><td>Once the agency admin (FMO, EMO, MGA) initiates an appoitment on your behalf with their agency, the agent will receive the following email notification</td></tr>
<tr><td></td><td>

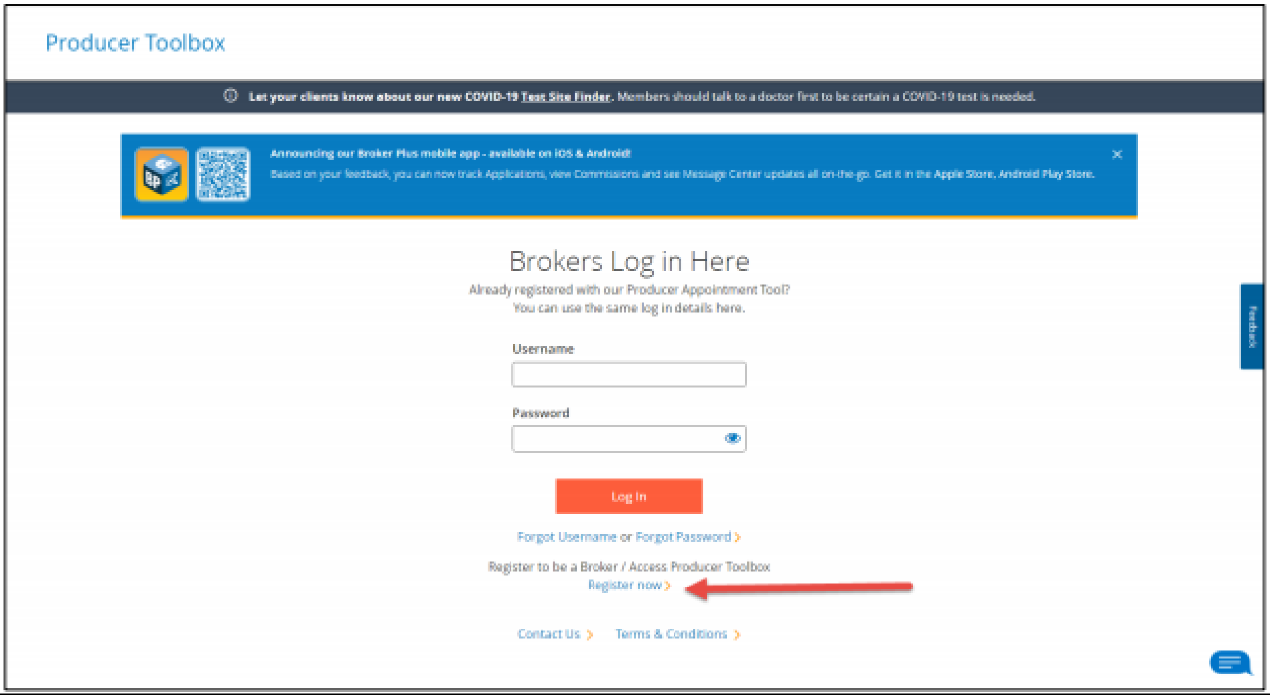
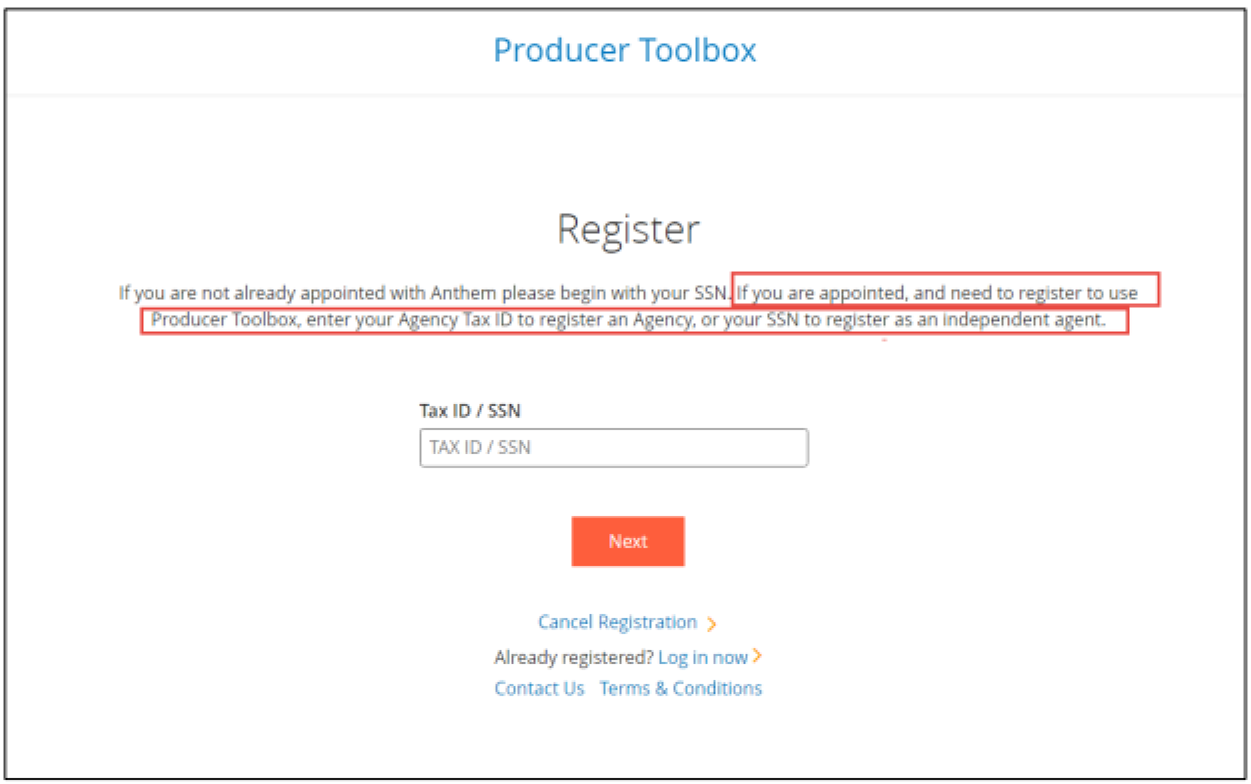
SoftwareSupport@anthem.com<br>
Action Required: Your agency has asked us to appoint you<br>
To<br>
If there are problems with how this message is displayed, click here to view it in a web browser.<br><br>
LEN[illegible]D,<br><br>
J[illegible] INC initiated an Appointment for you 50[illegible]).<br><br>
We look forward to having you join us. You need to take a few more steps to complete the broker Appointment process and start selling:<br>
1. Log in or register using our Producer Toolbox.<br>
https://broke[illegible]w/5[illegible]/appointments<br>
2. Once you log in or register, you'll be taken to your dashboard. Select the Complete Appointment button to finish the appointment process.<br><br>
Depending on your type of Appointment, you may need to:<br>
1. Complete the Business Survey questions<br>
2. Electronically sign and submit documents for review<br>
3. Submit payment (if applicable)<br><br>
Once your completed application is approved, you will have access to your Book of Business in Producer Toolbox. Producer Toolbox provides important product and commission information, helpful sales tools, news, and resources.<br><br>
If this appointment request was initiated without your knowledge or consent, please contact our Licensing and Credentialing team at 877-304-6470.<br><br>
For Producer Toolbox technical support, please contact User Software Support at 888-268-4361 or at software.support@anthem.com.<br><br>
Thanks for being an Anthem partner,<br>
Licensing & Credentialing Team</td></tr>
<tr><td>2</td><td>Click on the link in the email notification or go to Anthem.com, click ‘Producers’ and ‘Login’, or use this direct link: https://brokerportal.anthem.com/apps/ptb/login</td></tr>
<tr><td></td><td>Register and/or login page appears
<table>
<tr><th>If:</th><th>Then:</th></tr>
<tr><td>You are a New Agent</td><td>Proceed to Step 3</td></tr>
<tr><td>You are an existing Agent and you do not have a Producer Toolbox account</td><td>Proceed to Step 7</td></tr>
<tr><td>You are an existing Agent and you have a Producer Toolbox account</td><td>Proceed to Step 22</td></tr>
</table></td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>3</td><td>New Agent – Click on “Register Now” to get registered

</td></tr>
<tr><td>4</td><td>Enter your SSN and select Next</td></tr>
</table>

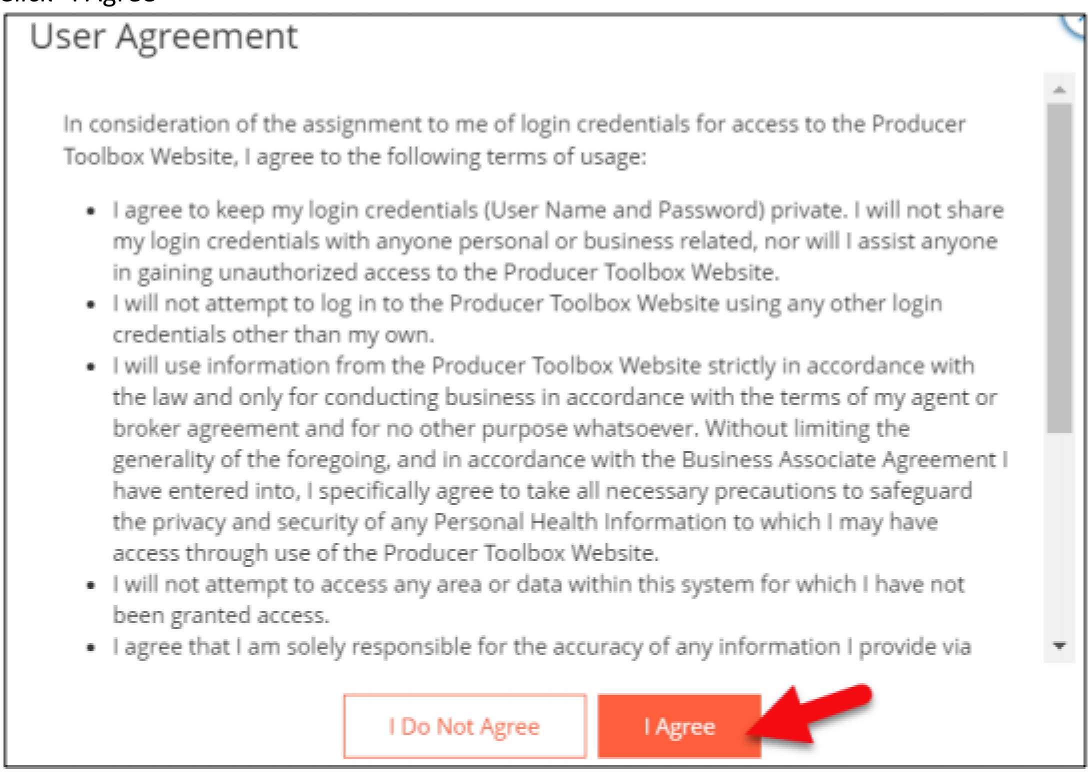
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>


</td></tr>
<tr><td>5</td><td>
Populate all fields and click “Create Account”:<br><br>
Please Note:
<ul><li>Tax ID must be 9 characters in length</li></ul>
User Name Rules:
<ul><li>User Name needs to be between 6-20 characters and only letters, numbers and the “@” symbol are allowed</li>
<li>User Name should not start with a number or include spaces</li></ul>
Password Rules:
<ul><li>Password must be more than 8 letters or numbers and should be limited to a length of 20 characters</li></ul>
</td></tr>
<tr><td>6</td><td>
Successful prompt will appear, click “Log in now”


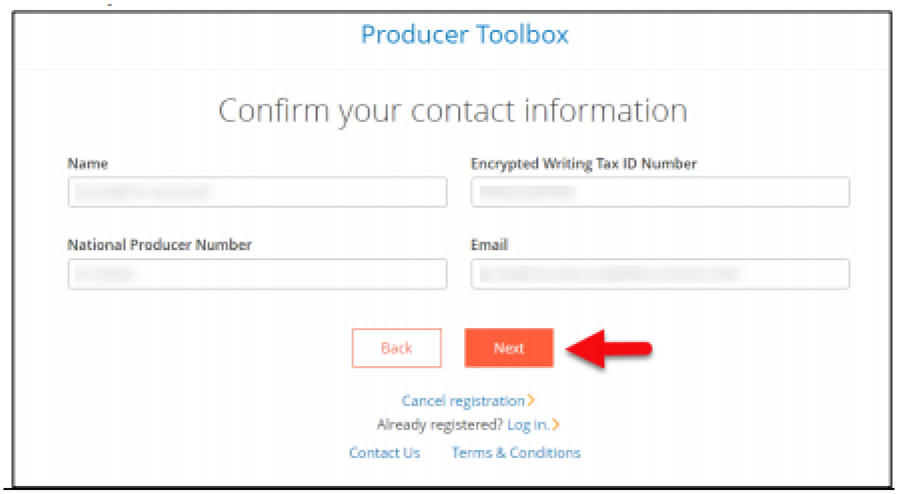
Proceed to Step 17
</td></tr>
</table>

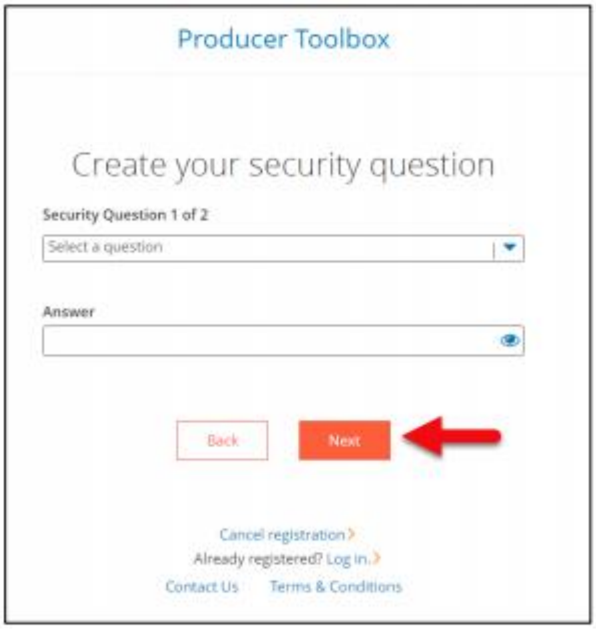
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>If you are an existing agent, but have not registered, click on “Register Now”<br>

</td></tr>
<tr><td>8</td><td>Enter your Tax ID / SSN and select “Next”<br>

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

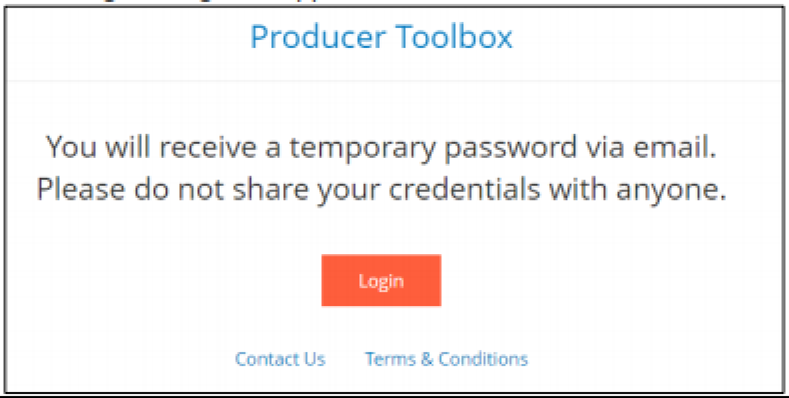
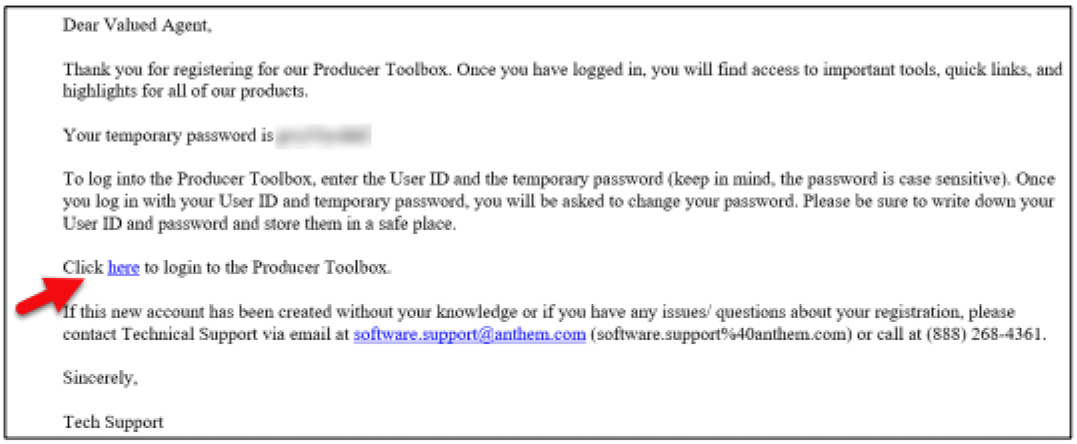
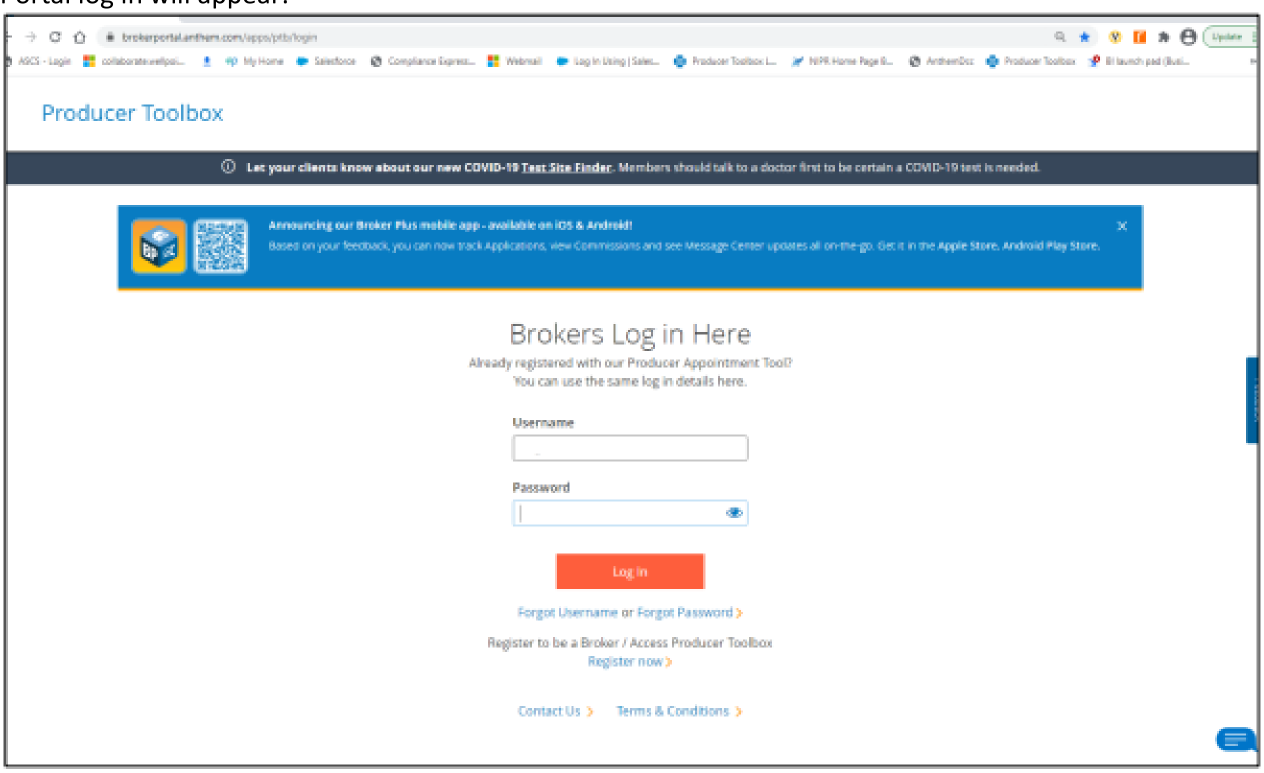
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>Click “Next”<br>

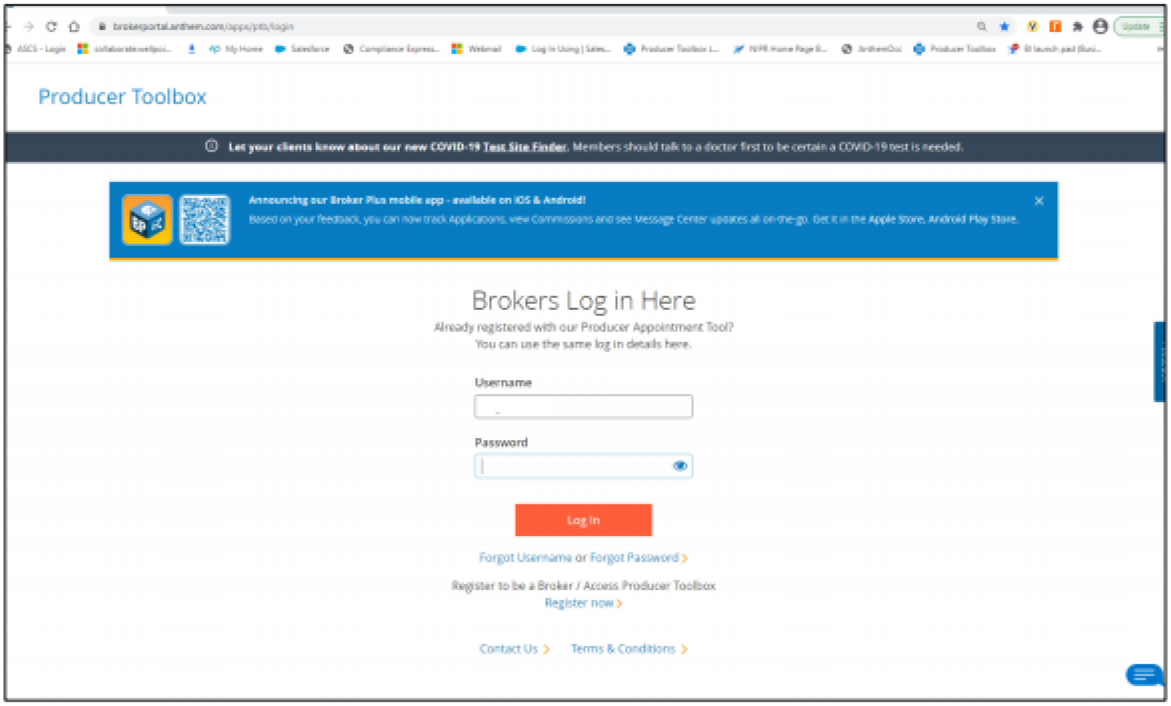
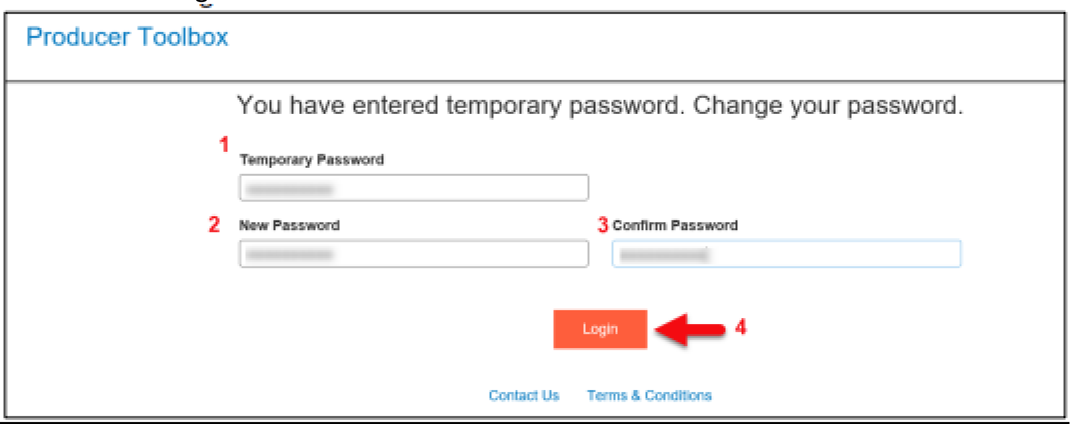
</td></tr>
<tr><td>10</td><td>Click “I Agree”<br>

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

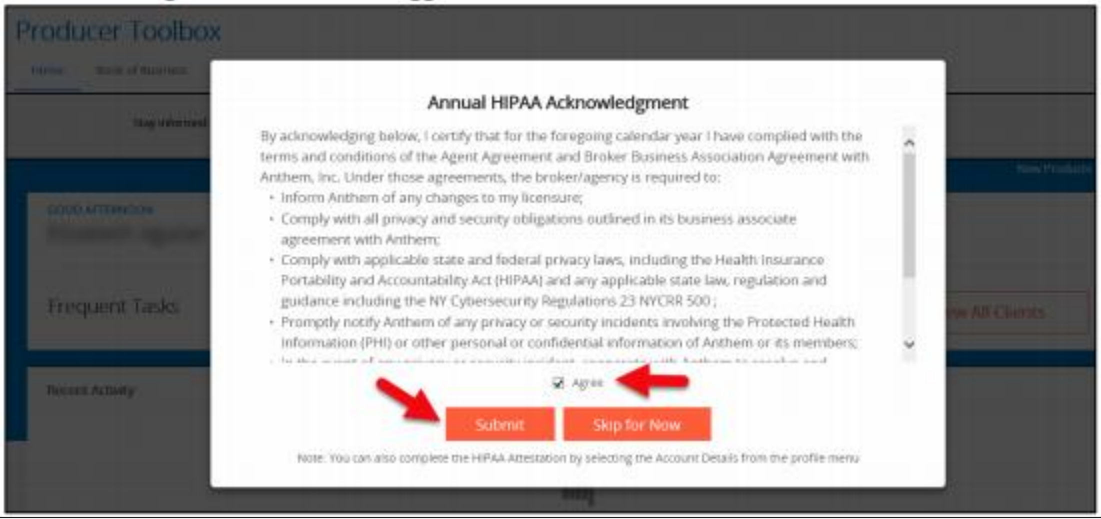
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td></td></tr>
<tr><td>11</td><td>Select the radial button “Register as an Independent Agent”<br>Populate fields as follows:
<ul><li>SSN/Tax ID = Agent’s SSN/Tax ID</li><li>Email = Email address on file in our licensing system for the agency</li></ul>
Click “Next” and proceed.<br>

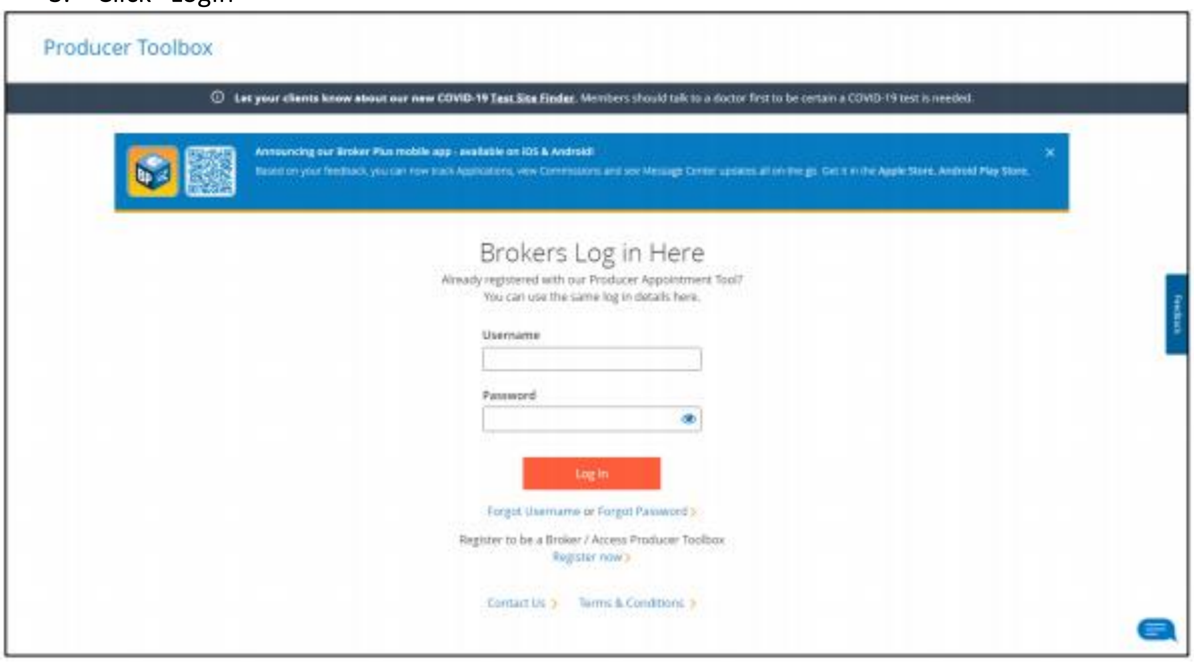
</td></tr>
<tr><td>12</td><td>Confirm your information is correct:
<ul><li>If information is correct, click “Next”</li><li>If information is not correct, contact Licensing & Credentialing at 1-877-304-6470 to update your information. Licensing & Credentialing is available Monday through Friday from 9am to 4:30pm EST</li></ul>

</td></tr>
<tr><td>13</td><td>Create your User Name, then click “Next”<br><br>User Name Rules:
<ul><li>User Name needs to be between 6-20 characters and only letters, numbers and the “@” symbol are allowed</li><li>User Name should not start with a number or include spaces</li></ul></td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Password Rules:<ul><li>Password must be more than 8 letters or numbers and should be limited to a length of 20 characters</li></ul></td></tr>
<tr><td>14</td><td>Select and answer the first security question, then click “Next”<br>
</td></tr>
<tr><td>15</td><td>Select and answer the second security question, then click “Next”<br>
</td></tr>
<tr><td>16</td><td>The following message will appear:</td></tr>
</table>

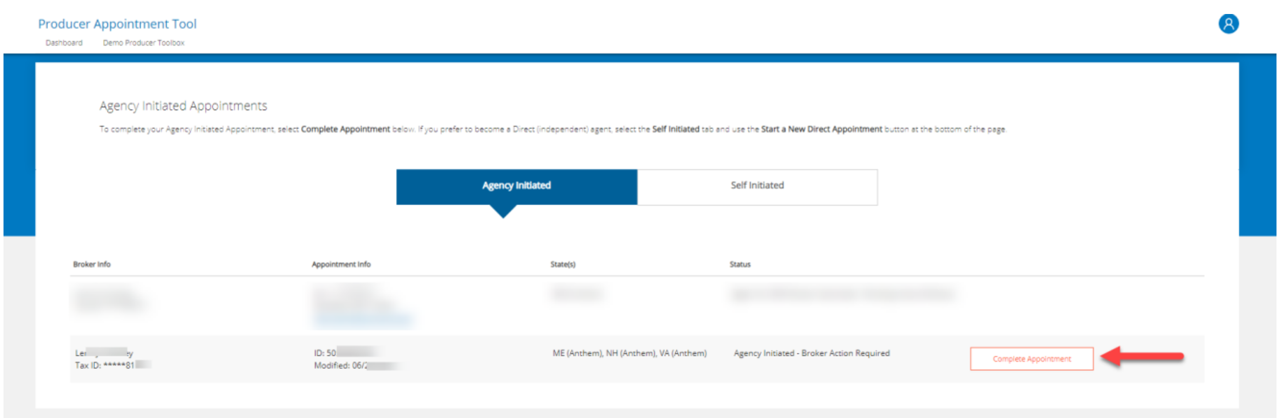
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>17</td><td>Once you receive your email with the temporary password, click on the link "here". You will be directed to the portal.<br><br>Dear Valued Agent,<br><br>Thank you for registering for our Producer Toolbox. Once you have logged in, you will find access to important tools, quick links, and highlights for all of our products.<br><br>Your temporary password is [redacted]<br><br>To log into the Producer Toolbox, enter the User ID and the temporary password (keep in mind, the password is case sensitive). Once you log in with your User ID and temporary password, you will be asked to change your password. Please be sure to write down your User ID and password and store them in a safe place.<br><br>Click here to login to the Producer Toolbox.<br><br>If this new account has been created without your knowledge or if you have any issues/ questions about your registration, please contact Technical Support via email at software.support@anthem.com (software.support%40anthem.com) or call at (888) 268-4361.<br><br>Sincerely,<br><br>Tech Support</td></tr>
<tr><td>18</td><td>Portal log in will appear:<br>
</td></tr>
<tr><td>19</td><td>Enter your "Username" and the temporary password you were issued and click "Log in":</td></tr>
</table>

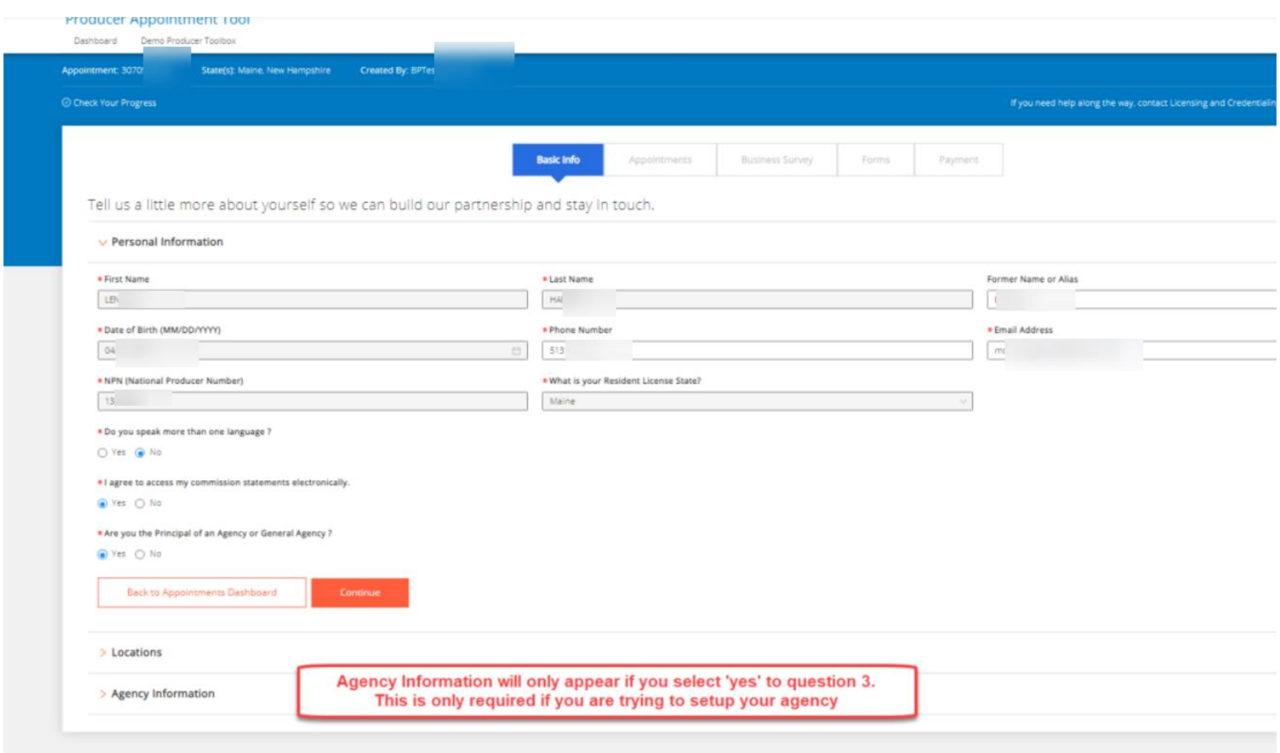
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>20</td><td>Enter:<br>1. Temporary password – supplied on the email you received<br>2. Create a new password<br>3. Confirm your new password<br>4. Click “Login”<br>
</td></tr>
<tr><td>21</td><td>Ensure the “Agree” checkbox is flagged and click “Submit”</td></tr>
</table>

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


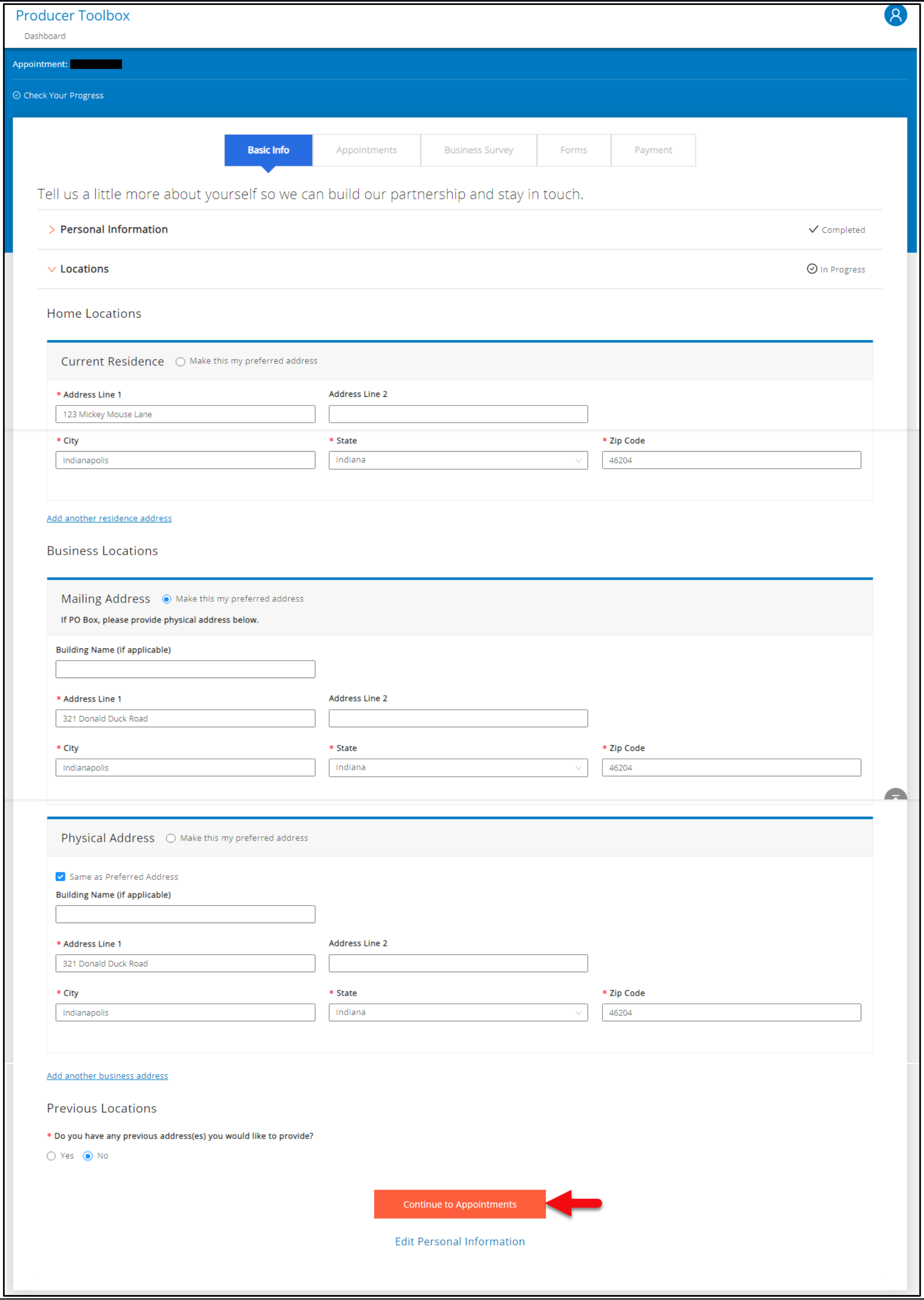
</td></tr>
<tr><td>22</td><td>
If you are an existing user and you have a Producer Toolbox account:<br>
1. Enter your username<br>
2. Enter password<br>
3. Click “Login”<br>


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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">Completing the Appointment Process</td></tr>
<tr><td>1</td><td>If logging in using the link in the email notification recived from SoftwareSupport@anthem.com, once logged in you will land directly in the appointment request.<br><br>If logging in by going to Anthem.com, clicking ‘Producers’ and ‘Login’, or using this direct link: https://brokerportal.anthem.com/apps/ptb/login you should see the screen below.<br><br>Click the ‘Complete Appointment’ button</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>2</td><td>Populate the required fields (fields with red asterisk) all other fields are prepopulated.<br>Answer the three questions:<br>➢ Do you speak more than one language?<br>➢ I agree to access my commission statements electronically?<br>    ➢ Yes = paper statements will not be mailed<br>    ➢ No = paper statements will be mailed<br>➢ Are you the Principal of an Agency or General Agency?<br>    ➢ Yes = you are requesting your agency to be contracted/appointed<br>    ➢ No = you are not requesting your agency to be contracted/appointed<br><br>Note: The agency information section will only appear if you select ‘yes’ to indicate you are the Principal of an Agency or Genera Agency. If you are a not the principal of the agency, please select ‘no’ and you will not be prompted to enter any agency information.<br><br>Click “Continue”</td></tr>
</table>

| Step | Action |
|---|---|
| |  |
| 3 | Enter your Home, Business and Physical Locations:<br><br>**Note:** If your Business address is a P.O. Box, please provide a Physical Location<br><br>Click “**Continue to Appointments**” |

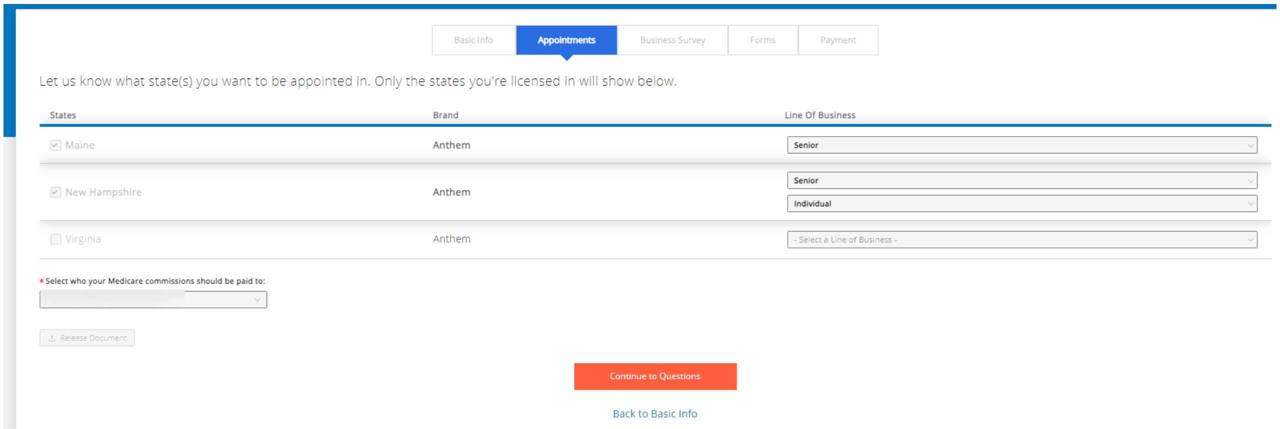
| Step | Action |
| --- | --- |
| | |
| | |

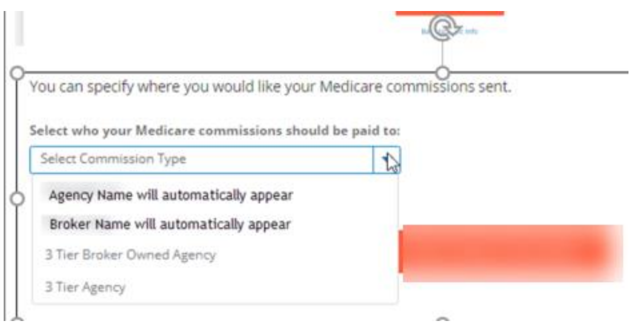


Producer Toolbox
Dashboard
Appointment: [redacted]
Check Your Progress
Basic Info
Appointments
Business Survey
Forms
Payment
Tell us a little more about yourself so we can build our partnership and stay in touch.
Personal Information
Completed
Locations
In Progress
Home Locations
Current Residence
Make this my preferred address
* Address Line 1
123 Mickey Mouse Lane
Address Line 2
* City
Indianapolis
* State
Indiana
* Zip Code
46204
Add another residence address
Business Locations
Mailing Address
Make this my preferred address
If PO Box, please provide physical address below.
Building Name (if applicable)
* Address Line 1
321 Donald Duck Road
Address Line 2
* City
Indianapolis
* State
Indiana
* Zip Code
46204
Physical Address
Make this my preferred address
Same as Preferred Address
Building Name (if applicable)
* Address Line 1
321 Donald Duck Road
Address Line 2
* City
Indianapolis
* State
Indiana
* Zip Code
46204
Add another business address
Previous Locations
* Do you have any previous address(es) you would like to provide?
Yes
No
Continue to Appointments
Edit Personal Information

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

1. Select the state/brand combinations you would like to be appointment/contracted in.
2. Select “Line of Business” – most states will have the options of Individual, Large Group, Small Group and Senior. You will select one option and then select Add another Line of Business to add additional options.
3. Select who your Medicare commissions should be paid to.
4. Once completed, click ‘**Continue to Questions’**.



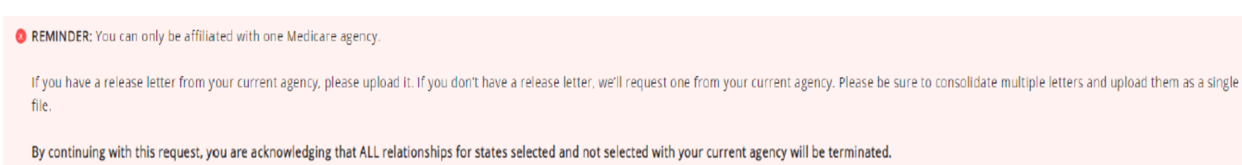

**Note:**

- If the Agency Admin selects the state(s) and commission payment structure, the broker will not be able to change this selection during the appointment process.
- Agents will only see direct pay options if their topline agency is opted into direct pay.
- 3 Tier Broker Owned Agency is a 3-tier setup where the broker owns the agency
- 3 Tier Agency is a 3-tier setup where the broker is a subagent under the 3-tier agency, not the owner Agents will only see direct pay options if their topline agency is opted into direct pay.

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

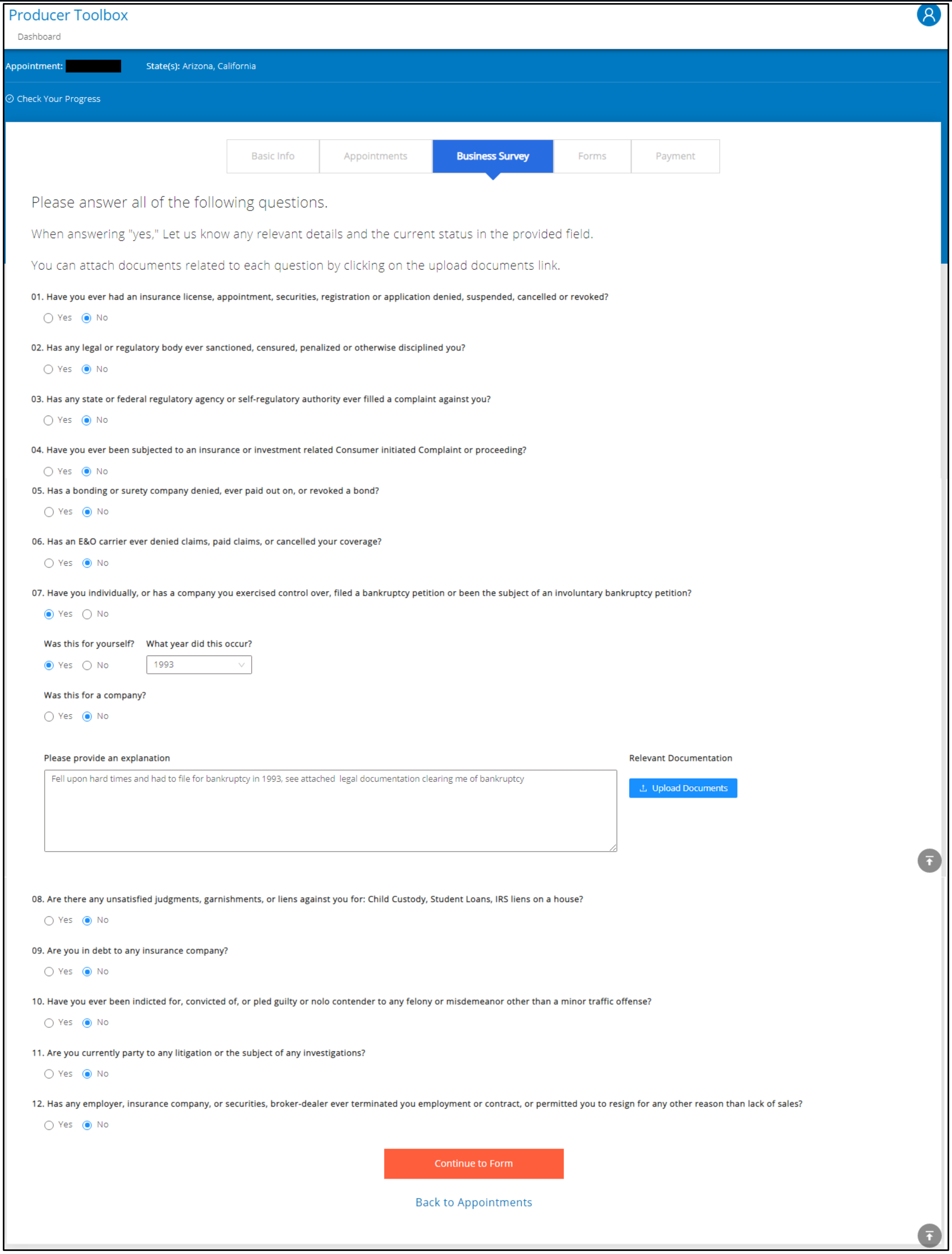
If a release is required due to an existing agency relationship, you will see the release information message. If a release is **not** required, you will not see any release information.

**Note:** Agents with an existing relationship with another agency in the same state may not be required to complete the ‘**Business Survey**’ or ‘**Payment**’ tabs. Therefore, those tabs may not appear and you will be prompted to **‘Continue to Forms’**




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

| Step | Action |
|---|---|
| 5 | Review and update the questions in the Business Survey section. Provide any additional information and select “Upload Documents” to attach any relevant documentation. Once completed, click “**Continue to Form**”.<br><br>**Note:** An explanation is required for each “Yes” answer. If sufficient information is not provided or attached it will cause processing delays or may result in a denial of your request. |

| Step | Action |
| --- | --- |
| |  |

Producer Toolbox

Dashboard

Appointment: [redacted] State(s): Arizona, California

Check Your Progress

Basic Info | Appointments | Business Survey | Forms | Payment

Please answer all of the following questions.

When answering "yes," Let us know any relevant details and the current status in the provided field.

You can attach documents related to each question by clicking on the upload documents link.

01. Have you ever had an insurance license, appointment, securities, registration or application denied, suspended, cancelled or revoked?

Yes No

02. Has any legal or regulatory body ever sanctioned, censured, penalized or otherwise disciplined you?

Yes No

03. Has any state or federal regulatory agency or self-regulatory authority ever filled a complaint against you?

Yes No

04. Have you ever been subjected to an insurance or investment related Consumer initiated Complaint or proceeding?

Yes No

05. Has a bonding or surety company denied, ever paid out on, or revoked a bond?

Yes No

06. Has an E&O carrier ever denied claims, paid claims, or cancelled your coverage?

Yes No

07. Have you individually, or has a company you exercised control over, filed a bankruptcy petition or been the subject of an involuntary bankruptcy petition?

Yes No

Was this for yourself? What year did this occur?

Yes No 1993

Was this for a company?

Yes No

Please provide an explanation

Fell upon hard times and had to file for bankruptcy in 1993, see attached legal documentation clearing me of bankruptcy

Relevant Documentation

Upload Documents

08. Are there any unsatisfied judgments, garnishments, or liens against you for: Child Custody, Student Loans, IRS liens on a house?

Yes No

09. Are you in debt to any insurance company?

Yes No

10. Have you ever been indicted for, convicted of, or pled guilty or nolo contender to any felony or misdemeanor other than a minor traffic offense?

Yes No

11. Are you currently party to any litigation or the subject of any investigations?

Yes No

12. Has any employer, insurance company, or securities, broker-dealer ever terminated you employment or contract, or permitted you to resign for any other reason than lack of sales?

Yes No

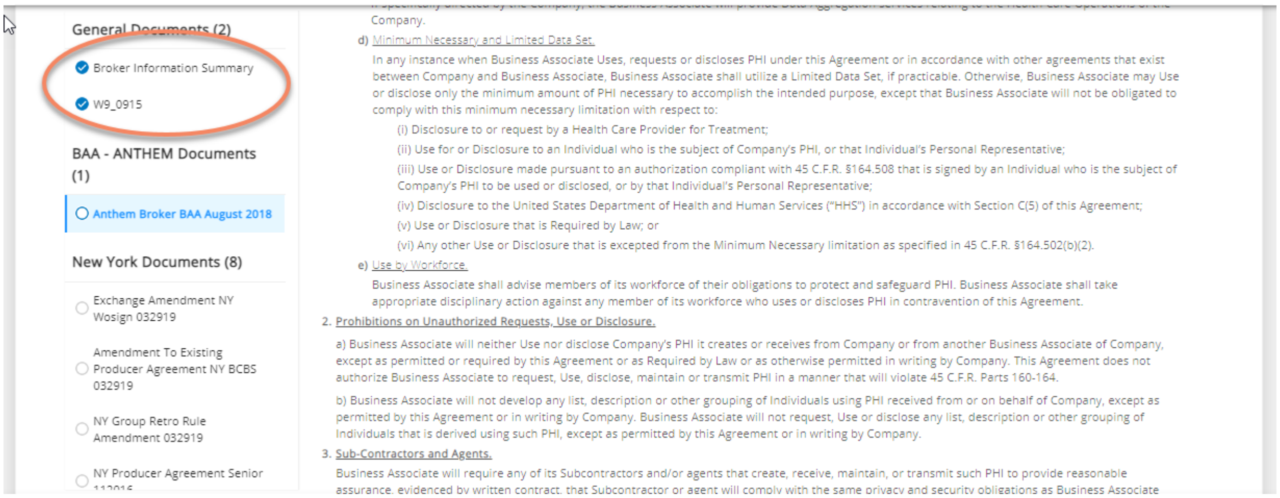
Continue to Form

Back to Appointments

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

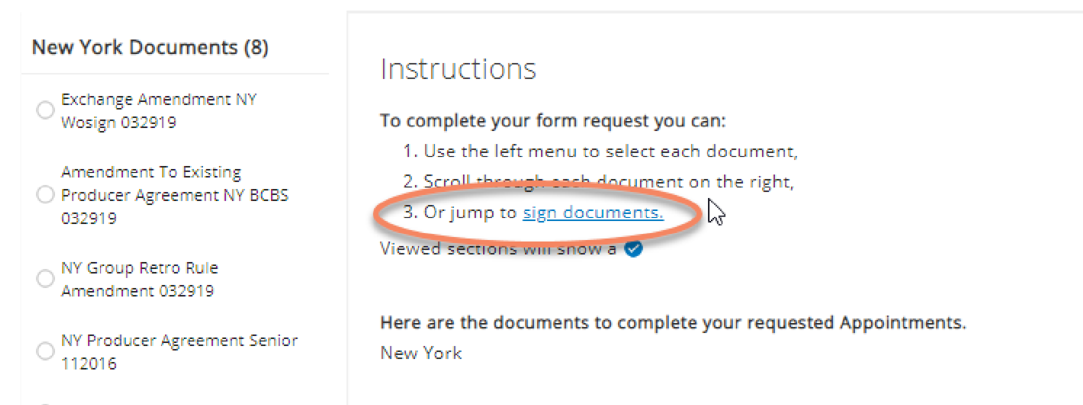
All the necessary forms you need to complete will appear down the left side of the screen. You can review all the forms by continuously scrolling down. A blue check mark will appear next to the form name as you scroll through it.

**Note:** You are no longer required to sign and date each form separately. We have implemented a single check box that allows you to sign and accept all documents automatically.

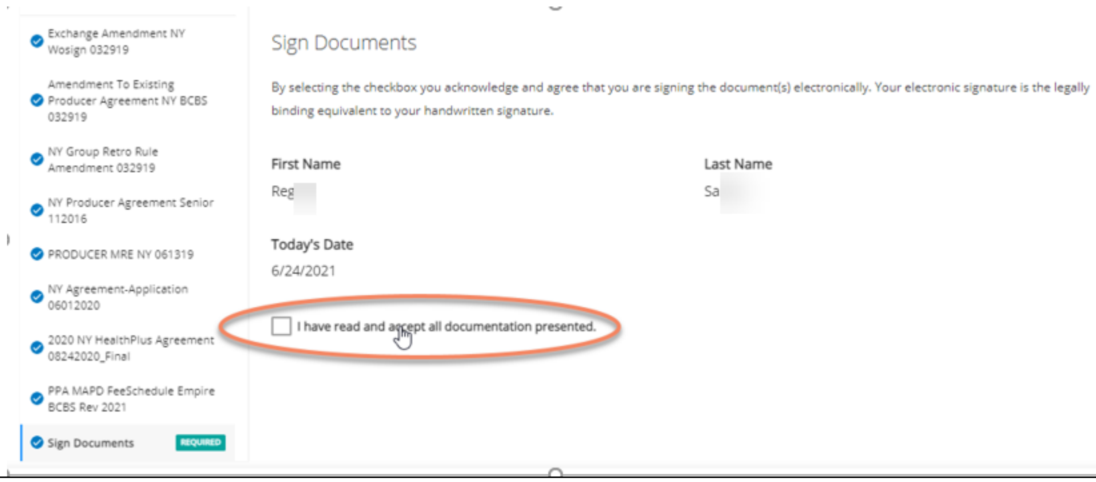
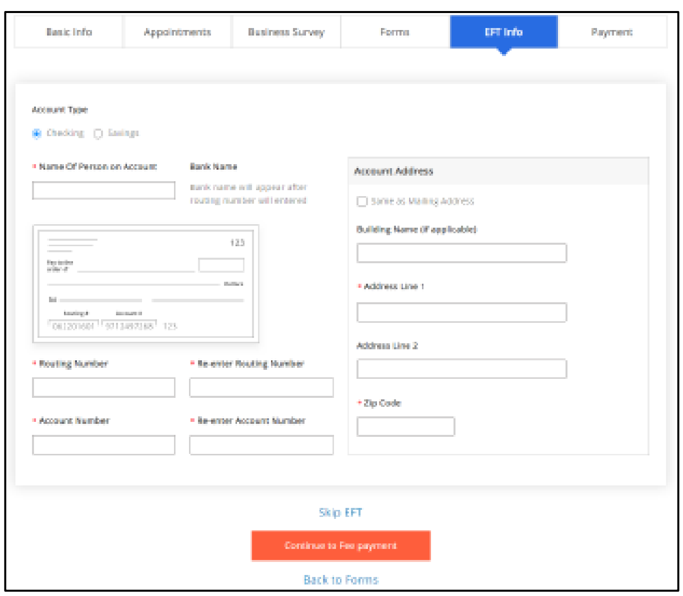


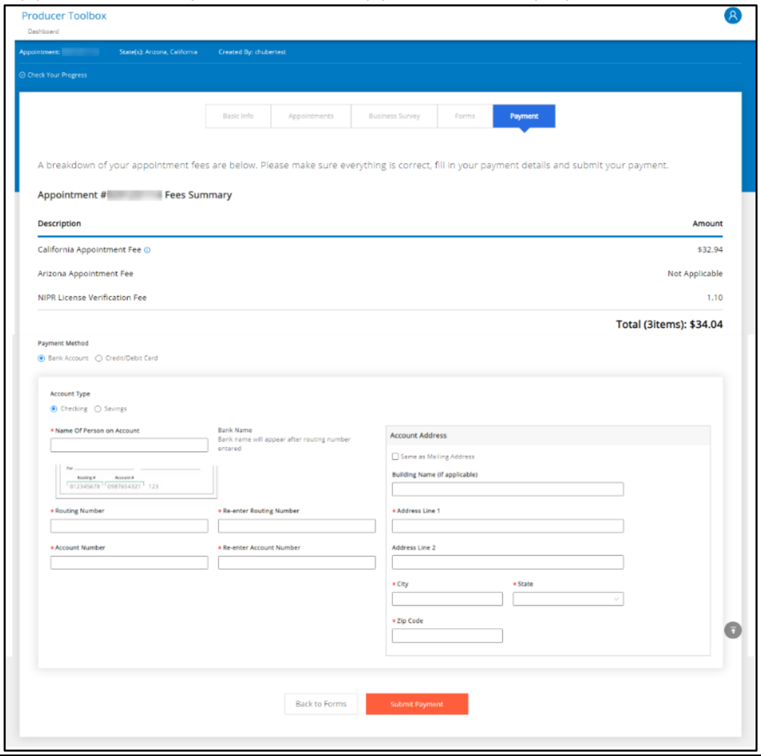
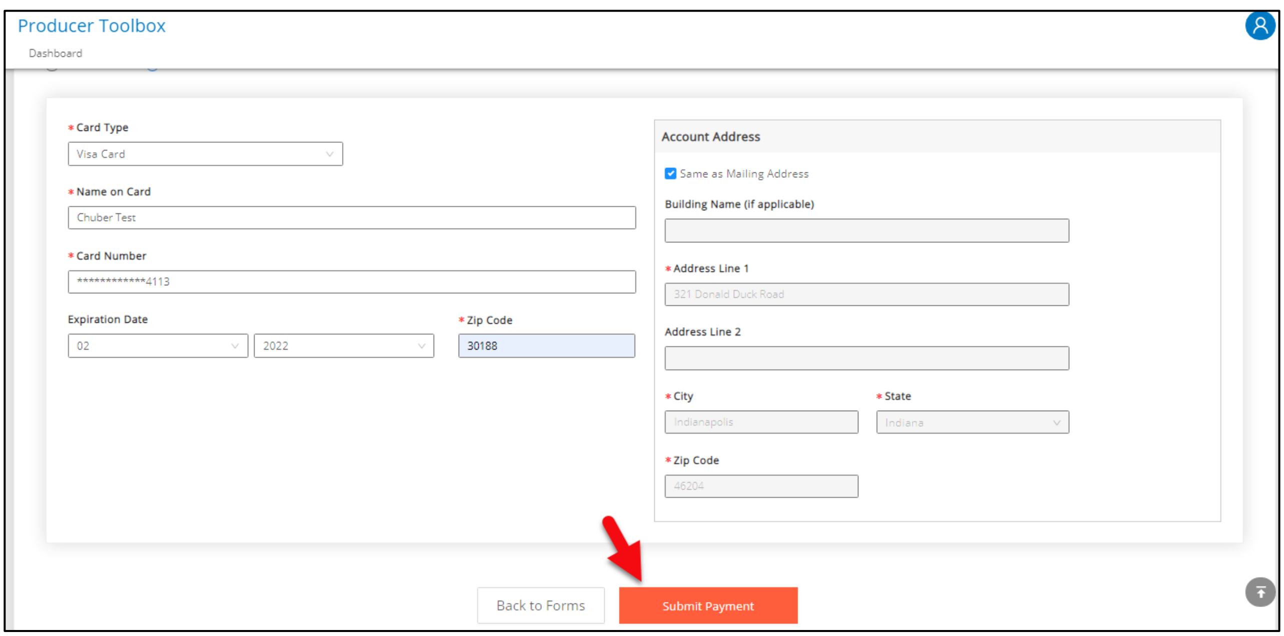

You have two options to complete the required forms:

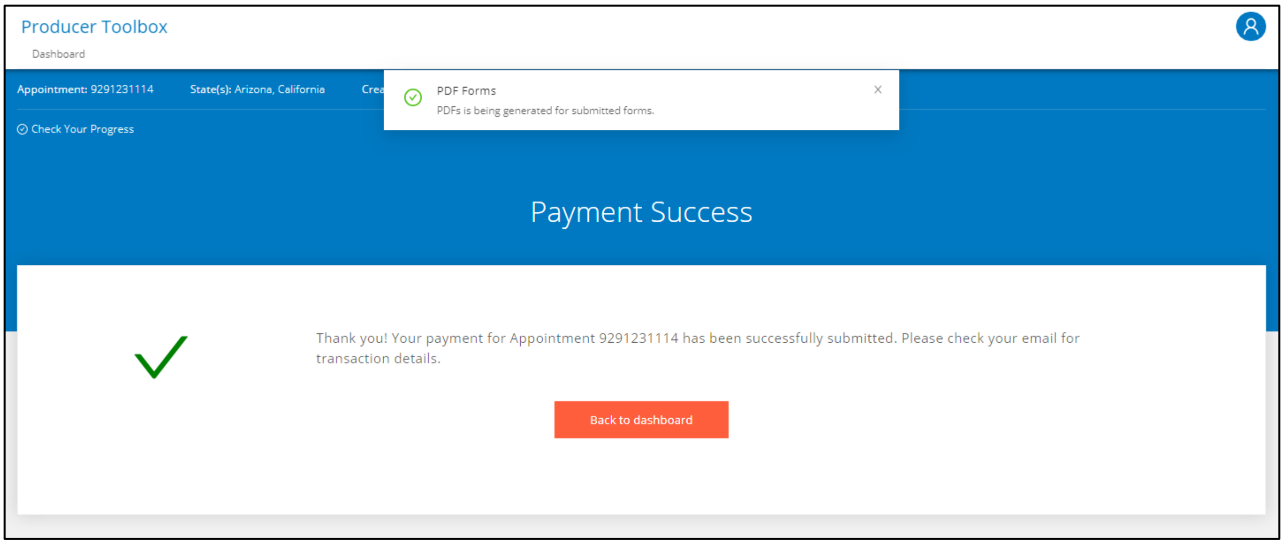
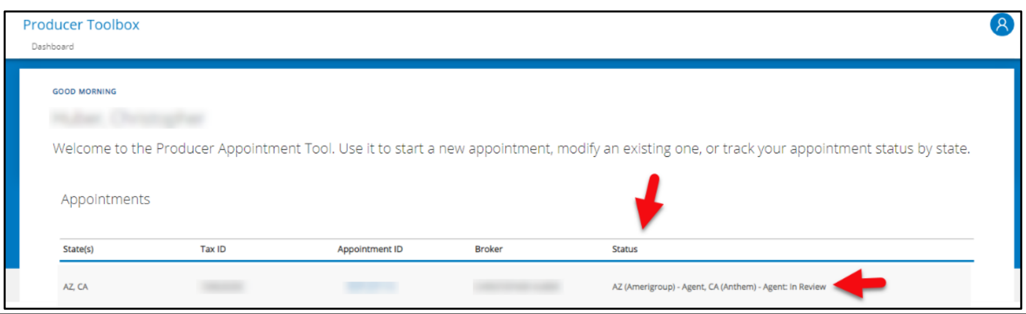
1. You can scroll to the bottom of the forms to the '**Sign Documents**' section



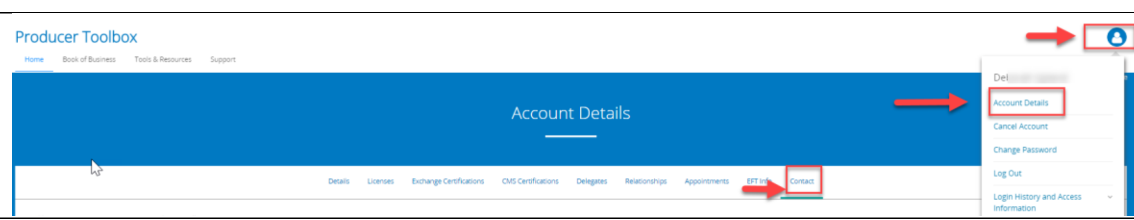

</td></tr>
</table>

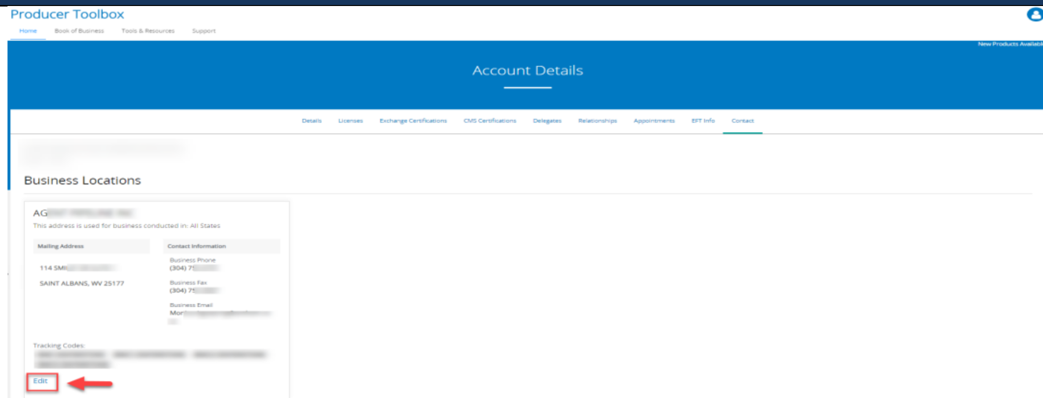
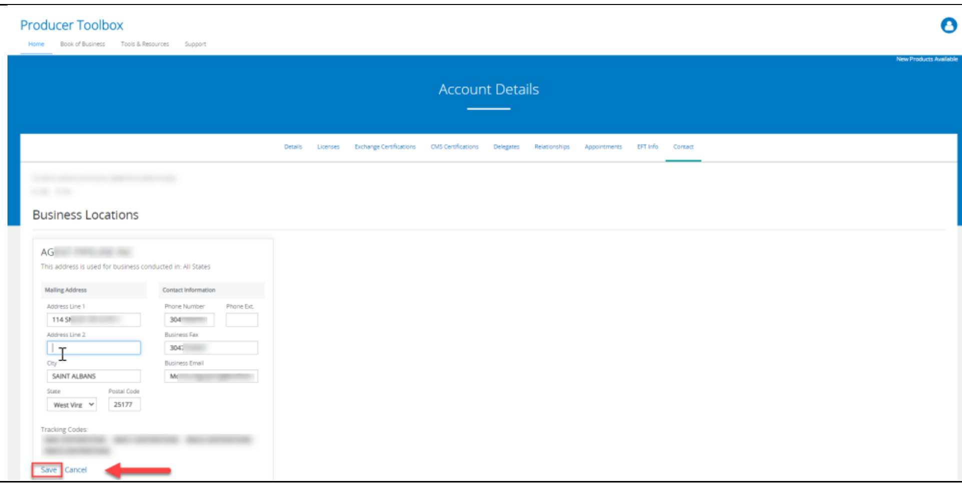
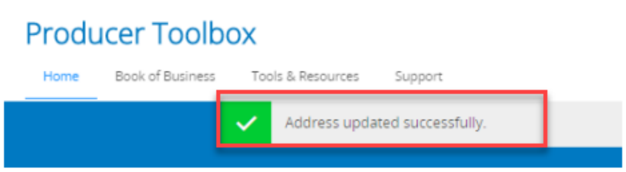
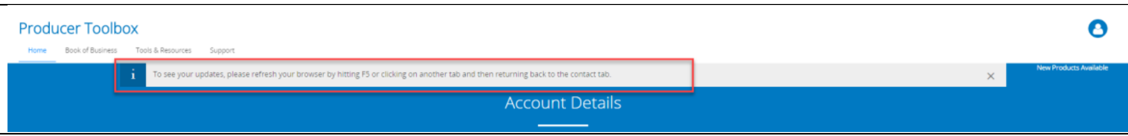
| Step | Action |
|---|---|
| 7 | To sign and accept all forms, all that is required is to check the box next to '**I have read and accept all documentation presented.**' and the system will automatically add your signature and date to all the forms.<br> |
| 8 | When the Forms are completed, you'll be directed to the next step with a button that says '**Continue to EFT**' or '**Continue to Payment**'. You will only be directed to the EFT page if you are receiving a commission payment directly from Anthem. |
| | Continue to EFT will appear if applicable.<br><br>Complete the EFT Info tab to set up how to receive your EFT.<br>Notes:<br>• This tab does not appear for sub agent types since their commissions work differently.<br>• Copy/Paste does NOT function in the "Re-enter" fields.<br>• This tab can be skipped and completed later in PTB on the User Profile Account Details.<br> |

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Click on “Continue to Fee payment”</td></tr>
<tr><td>9</td><td>Applicable fees per state will appear.  Select payment method and populate necessary information.<br>

</td></tr>
<tr><td>10</td><td>Click “Submit Payment”:<br>

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

| Step | Action |
|---|---|
| | |
| 11 | Appointment and Payment confirmation page will appear:<br> |
| 12 | You may then check the status of your request on your dashboard:<br> |

## Updating Contact/Demographic Information

| | |
|---|---|
| 1 | Once logged in, click on the profile icon, click **'Account Details'**, click **'Contact'** |
| |  |
| 2 | Click **'Edit'** |

| Step | Action |
|---|---|
| |  |
| 3 | Update the desired information (address, phone number, and/or email address) and click **'Save'** |
| |  |
| 4 | If updates are accepted, a successfully message will appear. |
| |  |
| 5 | The message below will then appear. To see your updates, click the 'F5' key or click on another tab and then return back to the contact tab. |
| |  |

| Version/Date | Update |
| --- | --- |
| 062821 | ○ Modified for June release features |