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 for FMO, EMO, and MGA agencies. Broker appointments under an FMO, EMO, or MGA agency must be initiated by the agency principal or assigned delegate and completed by the broker.

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Producer Toolbox Broker Onboarding - Agency Admin Process

Step			Action		
1	Go to Anthem.com, click 'P	roducers' and 'Logir	'n		
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	Individual & Family Medicare Medica	id Employers Producers	Providers	Log in Espanoi	
	Producers Overview			X	
	Blass and Bandara	6 iti	B		
	Plans and Services	Communications	Resources		
	Start Selling Anthem	Contact Us	Find Care		
	Medical	News Public Policy	HINO d FORM		
	Life & Disability	Public Policy			
	Supplemental Health		Registration		
	Pharmacy		Statement of Benefits (SOB)		
	Health & Wellness		Summary of Benefits and		
	Group Retiree Solutions (GRS)		Coverage (SBC)		
2	Register and/or login				
	If you are an existing broke	r or agency and you	have a Producer Toolb	oox account, enter your	
	username/password and cl	ick login			
	If you are an existing broke	r or agency but do n	ot have a Producer To	olbox account, click on re	egister now
	If you are a new broker or a	agency, click on go to	o the Producer site for	your state	
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	Not s	igned up? Register now >			
	Username				
	Password				
		Log In			
	Forgot Us	ername or Forgot Passw	ord >		
	Need information on An	them products or about	doing business with		
	us? Go to th	e Producer site for your	state >		
		11- T			
	Contact	US Terms & Conditio	ons		
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Admin Portion – Agency Onboarding Process

Step	Action
	Creating Agency Delegates
1	Click on the profile icon, 'Account Details', 'Delegates', 'Create New Delegate'
	Producer Teolbox
	Book of Business Tools & Resources Support
	New Products Available
	Account Datails
	Details Licenses Exchange Certifications CMS Certifications Delegates Relationships Appointments EFT info
	Create New Delegate
	Producer Toolbox
	Book of Business Tools D Resources Support
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	statements. This includes application status and memoreship details. O Ruit: A delegate with Ruit Access can view all sections of the web site including your online commission statements.
	O Size Administrator: A divergete with Size Admin Access can view at accessing your online commission statements. A Size Admin can also create accounts for storer assistants in your office
	Note:
	 Primary Users and Site Admin Users with Full Access can initiate appointments
	 Each agency can only have one Primary User

Step	Action	
	Initiating an Appointment	
	Note: Broker appointments under an FMO, FMO, or MGA agency must be initiated by the	he agency
	principal or assigned delegate (see section on creating delegates).	
1	Once logged in, click on the profile icon and click 'Account Details'	
	Producer Toolbox	
	Book of Business Tools & Resources Support	
	Stay informed about coronavirus (COVID-19) with our FAQs Learn More: ABCES_EBC	
		Account Details
		Cancel Account
	Book of Business	Change Password
		Log Out
	Cliens Renewals	Information
2	Click 'Appointments'	
	Producer Toolbox	0
	Book of Business Tools & Resources Support	New Products Available
	Account Details	
	Details Licenses Exchange Certifications OUS Certifications Delegates Relationships Apportments EFT info	
2		
3	Select either 'Single Appointment' or 'Multiple Appointments' and click 'Initiate'	
	Single appointment allows the user to initiate an appointment request for one broker at a	a time. Multiple
	appointments allows the user to initiate appointment requests for multiple brokers with	one submission.
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	Home Book of Business Tools & Resources Support	Masu Drodurte Availabla
	A second Data la	New Products Available
	Account Details	
	Details Licenses Exchange Certifications CIVIS Certifications Delegates Relationships Appointments 657 Info	
	Welcome to the Appointments section	
	Vielcome to the Appointments section. You can initiate single or multiple appointments, and track appointments by State. Single Appointment	Initiate
	You currently do not have any appointment started. Single Appointment	

Step	Action
4	If selecting 'Single Appointment', enter the required broker information (last name, tax id, email address)
	 Click 'Continue to Select Commission and State' if you want to select the commission payment structure and/or state(s) for the broker OR click 'Initiate Appointment' if you want to allow the broker to select the commission payment structure and/or state(s).
	Producer tooloox Book of Busines Tools & Resurces Support New Producer Available
	Initiate Appointment
	Basic Info Appointments
	Complete the Broker's Information below. An email will be sent to their address with further instructions to complete their appointment(s). Last Name * Privar Tax IO *
	Email Address *
	Continue to Select Commission and State Instate Appointment Cancel
5	If you click ' Initiate Appointment' , you will receive an appointment reference # and a button to return to the dashboard where you can view the status of appointment submissions
	Producer Toolbox Book of Barriers Tools & Resources Support New Product And Male Appointment Initiated
	This appointment (#020106) has been initiated. will receive an email with the next steps on how to complete their appointment
6	If you click ' Continue to Select Commission and State ', select all state(s) the broker should request an appointment for and/or the commission payment structure from the ' Send Commission To ' dropdown box then click ' Initiate Appointment '
	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.

Step	Action
	Producer Toolbox
	Book of Bunness Tools & Resources Support
	Initiate Appointment
	Note: Only states where the below fin
	licensed will Bask Info Appointments
	Let us know what state(s) you want to be appointed in. Only the states you're licensed in will show below.
	State Band
	C Artona Amerigroup
	Colorado Colorado Colorado Colorado Colorado Anteen
	O Missouri Arthem
	O Nevada Anthem
	You can specify where you would like your commission sent.
	Select Commission for
	Parent Agency Broker Back to Back
	3 Titer Broker Owned Agency 3 Titer Agency
	The 'Commission Paid To ' options are:
	1) Parent Agency – Parent FMO, FMO, MGA agency
	2) Broker – Paid to broker's TIN
	3) 3 Tier Broker Owned Agency – 3-tier setup where the broker owns the agency
	4) 3 Tier Agency – 3-tier setup where the broker is a subagent under the 3-tier agency, not the
	owner
	Note:
	- Agencies opted into direct pay will have the option to select send commission to parent agency,
	broker, 3 tier broker owned agency, and 3 tier agency. Agencies not opted into direct pay should
	select send commission to parent agency.
	- If initiating an appointment on behalf of a 3-Tier Broker Owned Agency, do NOT select the payment
	option for the broker. Leave it as blank/select when initiating the appointment request. During the
	broker portion of the appointment process, the broker will indicate he/she is the principal of the
	agency and will be prompted to complete the appropriate forms to get the appointment setup with
	the commissions being paid to their 3-tier broker owned agency.
7	Once you click 'Initiate Appointment', you will receive an appointment reference # and a button to return
	to the dashboard where you can view the status of the appointment submission.

Step	Action
	Producer Toolbox box of Basers total A ferrors Apport
	Appointment Initiated
	This appointment (#020106) has been initiated. will receive an email with the next steps on how to complete their appointment Image: Complete their appointment of the complete the
8	If selecting 'Multiple Appointments', take the following steps. - Select 'Multiple Appointments' and click 'Initiate'
	Producer Toolbox Support
	Account Details
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9	Select "Download template" The excel template "BulkUploadTemplate_OptOut" or "BulkUploadTemplate_OptIn" should download
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Ont-In 1	Complato -	Agoncios	atun to offer di	irect pay to bro	kors			
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							characters, - and ' allowed • Broker Tax ID (Mandatory) - enter	
							 number Email (Mandatory) - Enter correct f "xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	
							Commission Type (Optional)- Select dropdown	
							Agency Tax ID - Mandatory for Comm types - 3 Tier Broker Owned Agency & 3 Agency	
	-						**Agency must have existing affiliati with Anthem	
							Available commission types:	
							Parent Agency Broker	
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Admin Portion – Agency Onboarding Process

Step	Action
12	Once the file is uploaded, you will see a 'File Uploaded Successfully' message.
	Click 'Initiate'
	Back to Account Details
	Initiate Appointments for multiple brokers at one time.
	Required Per Broker
	Last Name Commission Type: The Design of the
	Tak ID Parent Agency Tax ID (Mandatory for 3 tier Broker Owned Agency) Email Address Agency Tax ID (Mandatory for 3 tier Broker Owned Agency)
	Download Template
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	Upload File Drag and Drap Files Here
	Test Bulk Upload -072820 - 1 x/dx
	Remove Initiate
13	After hitting 'Initiate' you will see a success message if all agents successfully processed or you will see a
	nartial success message with a list of failed records that were not successfully processed. Any failed
	records need to be undated and resubmitted
	Producer Toolbox
	Home Book of Business Tools & Resources Support
	Initiate Appointments for multiple brokers at one time.
	United the services with the following information:
	Required Per Broker
	Lass Name Commission Type: The Development of the D
	Email Address Agency Tax ID (Mandatory for 3 tier Broker Owned Agency) 3 tier Agency ()
	Download Template
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	Success!
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	Return to Dashboard Upload another File
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	Required Per Broker Optional Per Broker Last Name Commission Type: Tax ID Parent Agency, Broker, 3 ter Broker Owned Agency, 3 ter Agency Email Address Agency Tax ID (Mandatory for 3 ter Broker Owned Agency, 3 ter Agency	0
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	Partial Success! Deter Tax IDs have failed the initiation. Plases resulting the appointment for these IDs Partiel records : 54111115 June You can view the successful appointments on your distributed. Return to Dashboard Upload another File	
14	Click ' Return to Dashboard' to see brokers who appointments were successfully dashboard.	initiated for on your

	Action	
Agency Dashboard		
 The agency dashboa Here you will see the You are also able to This will allow sorting 	ard appears under ' Account Details' , ' App e status for appointment requests initiate export the dashboard into excel by clickin ng of the data on the dashboard.	pointments' ed by you. ng on ' Export Dashboard '.
Note: - Once a broker h process (basic in ID' hyperlink to broker completi on the appointm	has logged in and complete the first two tan fo and appointment tabs), you are able t see details related to that specific broker ing those initial tabs, you will receive an e nent id hyperlink.	abs of the appointment o click on the ' Appointment appointment. Prior to the rror message when clicking
Producer Toolbox		0
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Resources

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

Version/Date	Update
062520	 Original document
071220	 Add required delegate access level – page 3
	 Move creating agency delegates section up in document – page 3
	 Add 3-tier broker owned agency details – page 6
081920	 Add initiating multiple appointments – pages 7-10
	 Add exporting dashboard – page 11
	 Add clarifying details regarding appointment id hyperlink on the
	agency dashboard – page 11