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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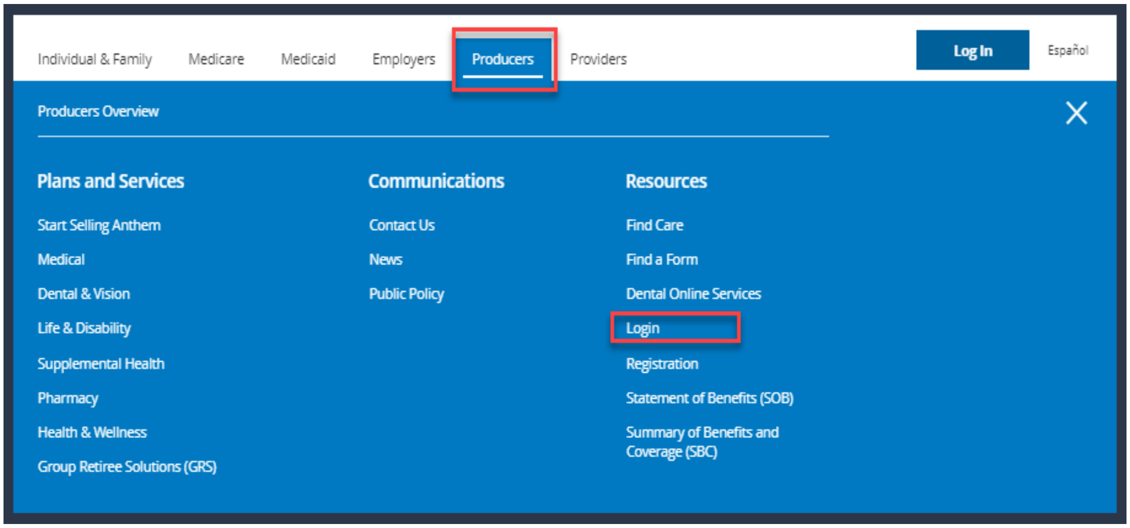
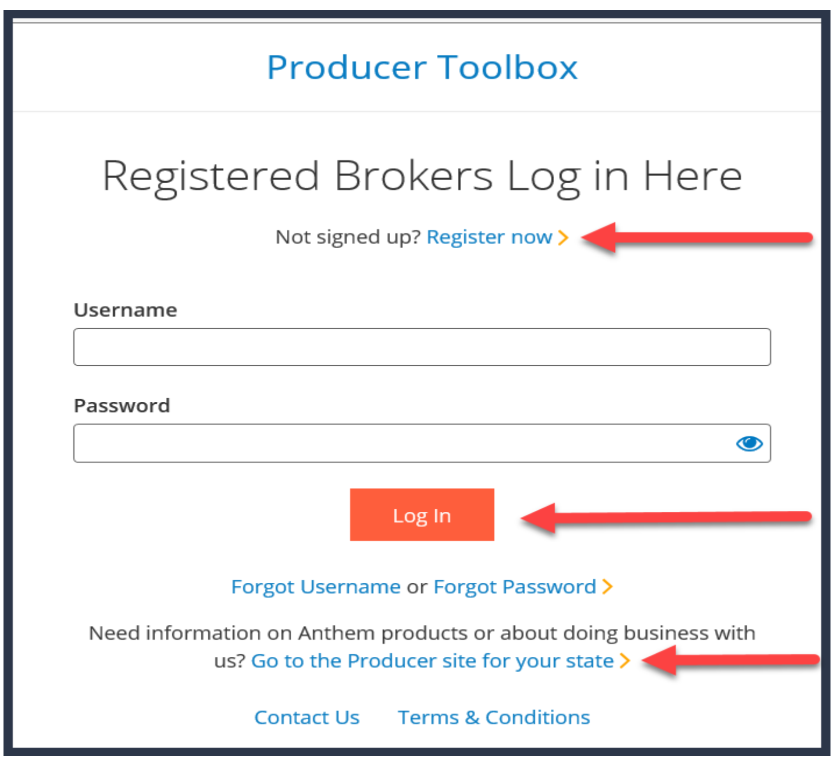
Producer Toolbox Broker Onboarding - Agency Admin Process

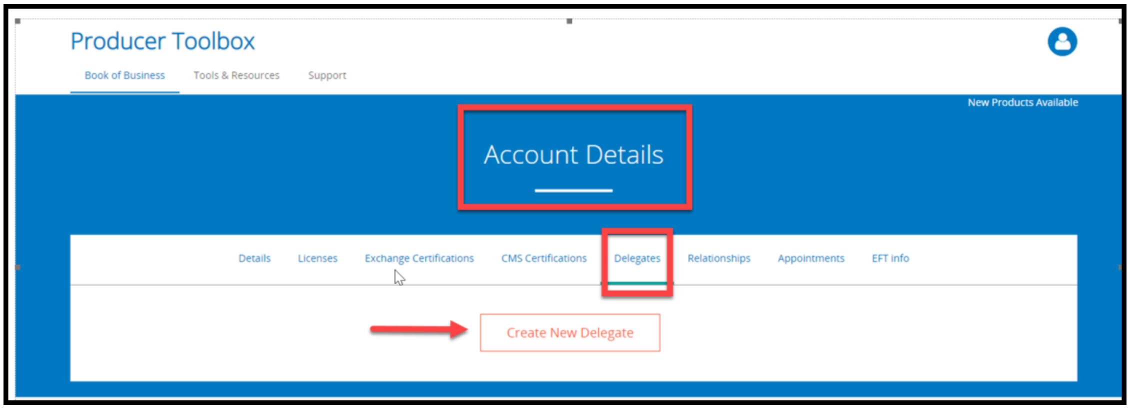
Step	Action
1	Go to Anthem.com, click ‘**Producers**’ and ‘**Login**’

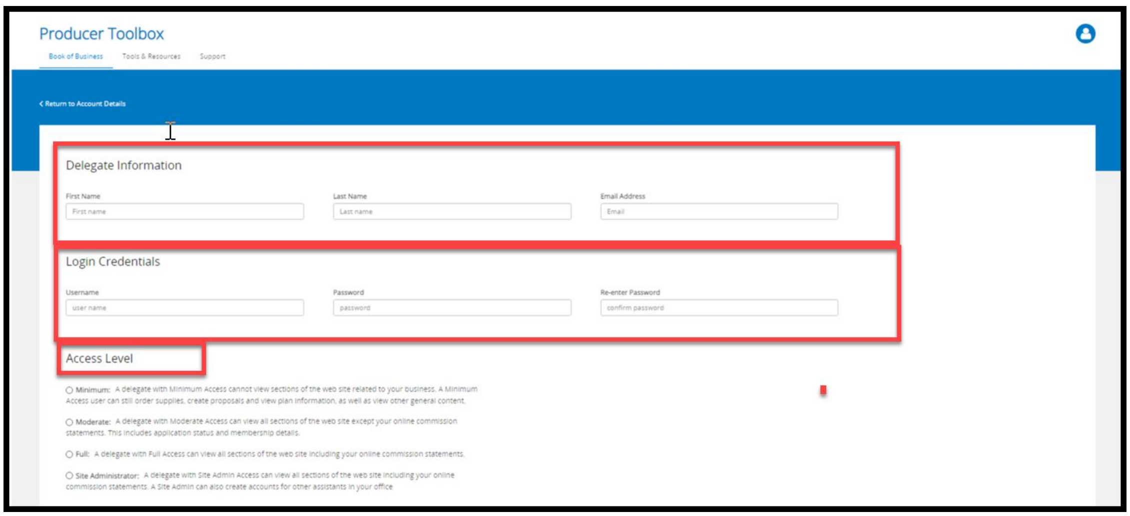


Step	Action
2	Register and/or login
	If you are an existing broker or agency and you have a Producer Toolbox account, enter your username/password and click login
	If you are an existing broker or agency but do not have a Producer Toolbox account, click on register now
	If you are a new broker or agency,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



Step	Action
	Creating Agency Delegates
1	Click on the profile icon, ‘**Account Details’**, ‘**Delegates**’, **‘Create New Delegate’**

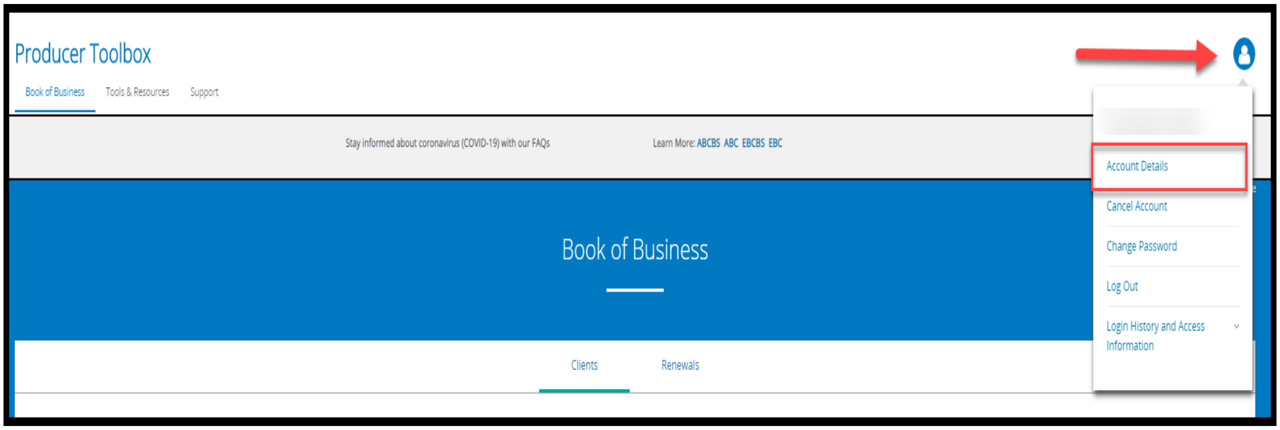


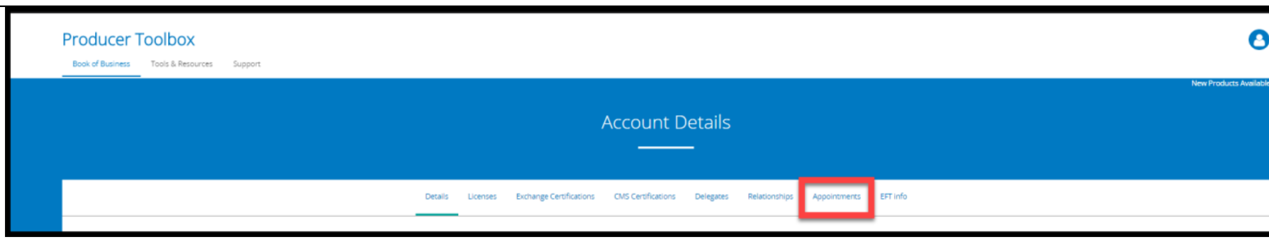


Note:

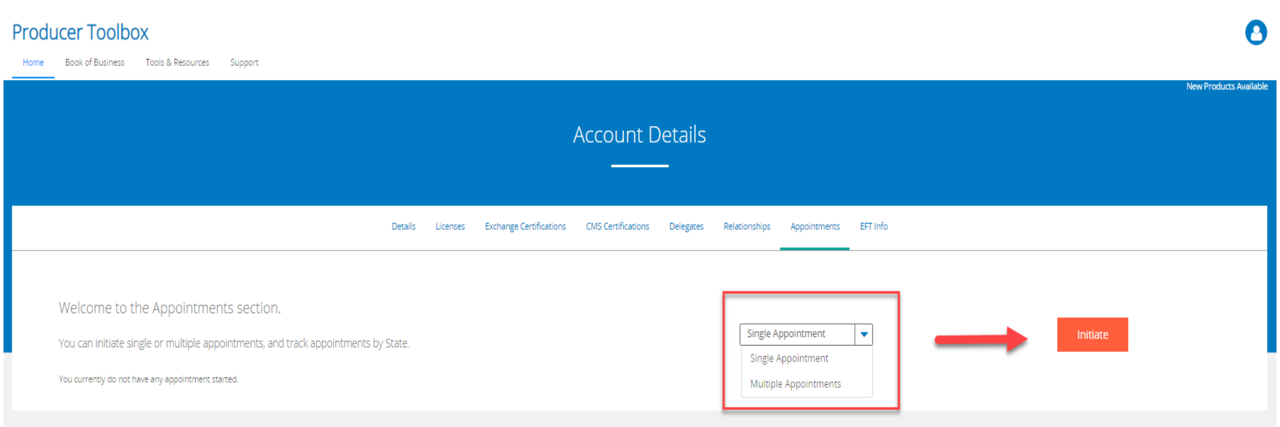
- **Primary Users** and **Site Admin Users** with **Full Access** can initiate appointments
- Each agency can only have one **Primary User**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Initiating an Appointment

Note: Broker appointments under an FMO, EMO, or MGA agency must be initiated by the agency principal or assigned delegate (see section on creating delegates).</td></tr>
<tr><td>1</td><td>Once logged in, click on the profile icon and click ‘Account Details’</td></tr>
<tr><td></td><td>


</td></tr>
<tr><td>2</td><td>Click ‘Appointments’</td></tr>
<tr><td></td><td>


</td></tr>
<tr><td>3</td><td>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 time. Multiple appointments allows the user to initiate appointment requests for multiple brokers with one submission.</td></tr>
<tr><td></td><td>


</td></tr>
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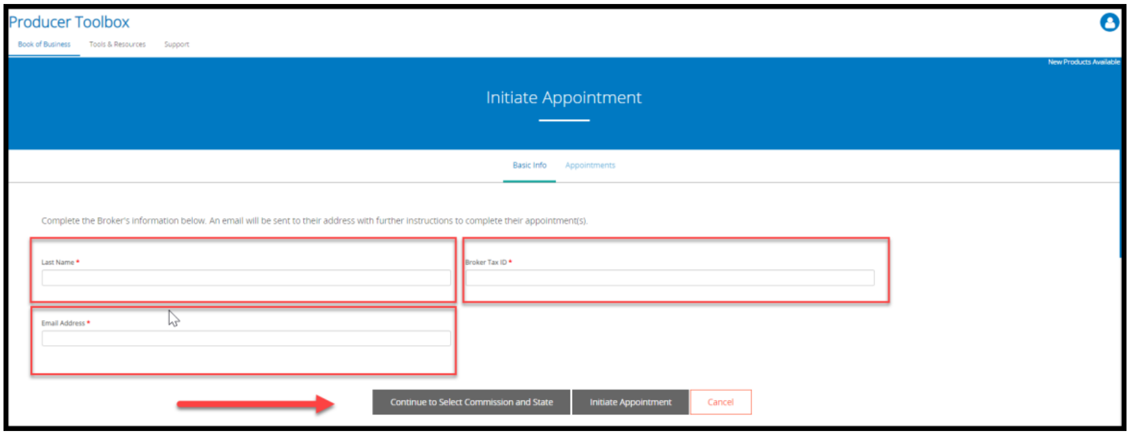
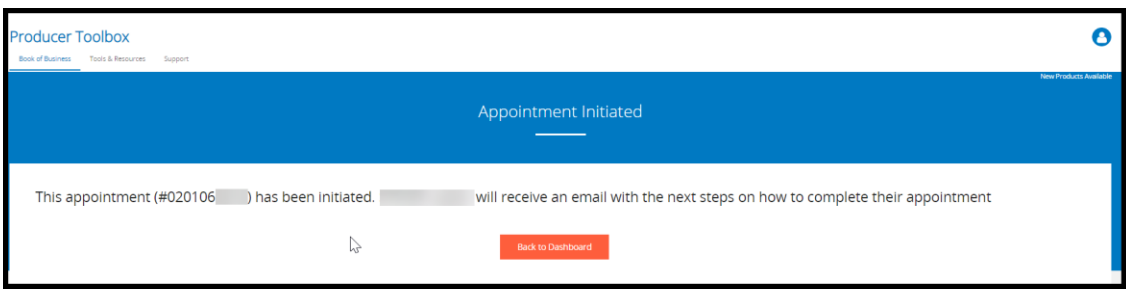
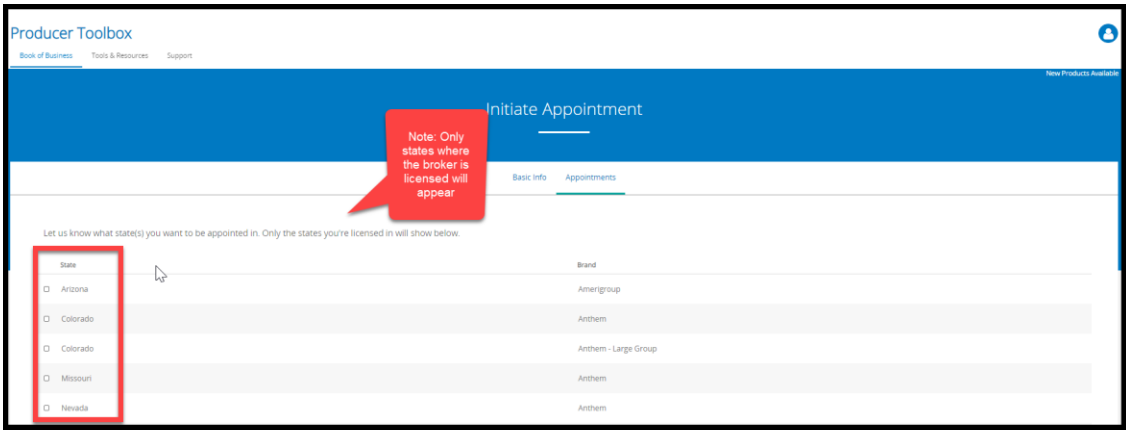
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>If selecting ‘Single Appointment’, enter the required broker information (last name, tax id, email address)

- 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).</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>5</td><td>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</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>6</td><td>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.</td></tr>
</table>

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



The '**Commission Paid To**' options are:
1) Parent Agency – Parent FMO, EMO, 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.**

</td></tr>
<tr><td>7</td><td>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.</td></tr>
</table>

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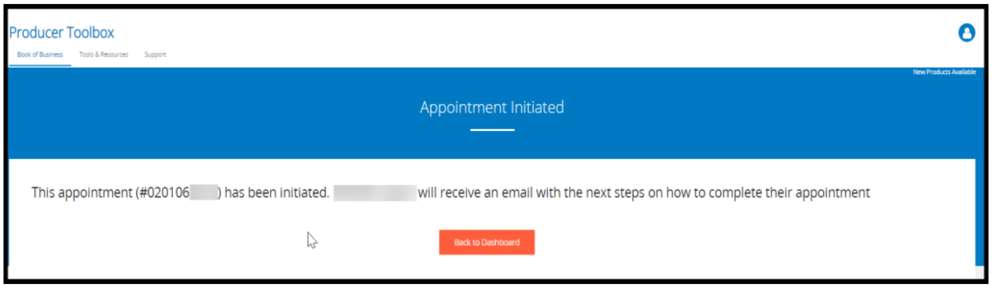
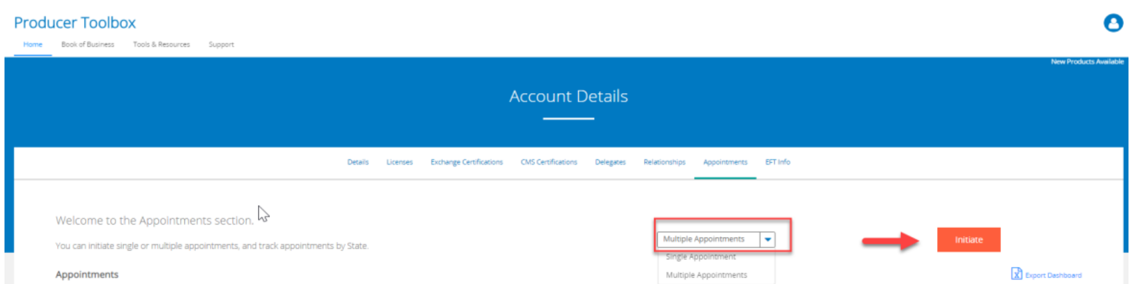
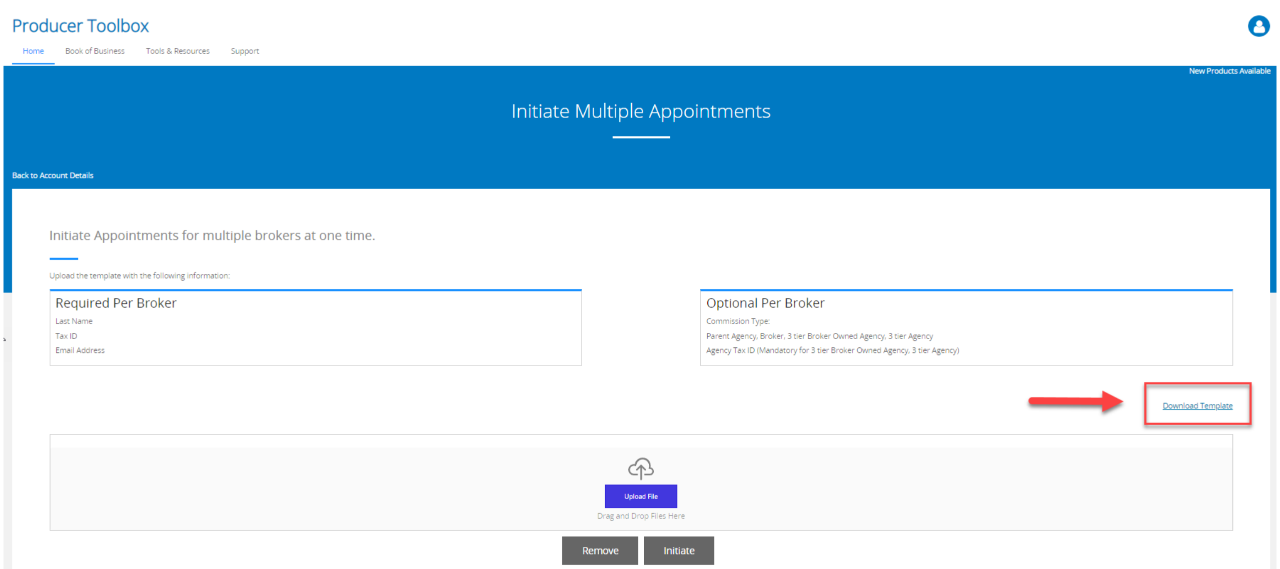


</td></tr>
<tr><td>8</td><td>If selecting ‘Multiple Appointments’, take the following steps.
- Select ‘Multiple Appointments’ and click ‘Initiate’</td></tr>
<tr><td></td><td>


</td></tr>
<tr><td>9</td><td>Select “Download template”
The excel template “BulkUploadTemplate_OptOut” or “BulkUploadTemplate_OptIn” should download


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Step	Action
10	Enter data in the required fields

Opt-Out Template – Agencies not setup to offer direct pay to brokers

MANDATORY	MANDATORY	MANDATORY
Last Name	**Broker Tax ID**	**Email**

Instructions:
Please enter mandatory fields as per the specifications:
- **Last Name (Mandatory)** - enter only characters, - and ' allowed
- **Broker Tax ID (Mandatory)** - enter 9 digit number
- **Email (Mandatory)** - Enter correct format "xxxxxxxxxx@xxx.xx"
- **Commission Type - Parent Agency (default)**

Opt-In Template – Agencies setup to offer direct pay to brokers

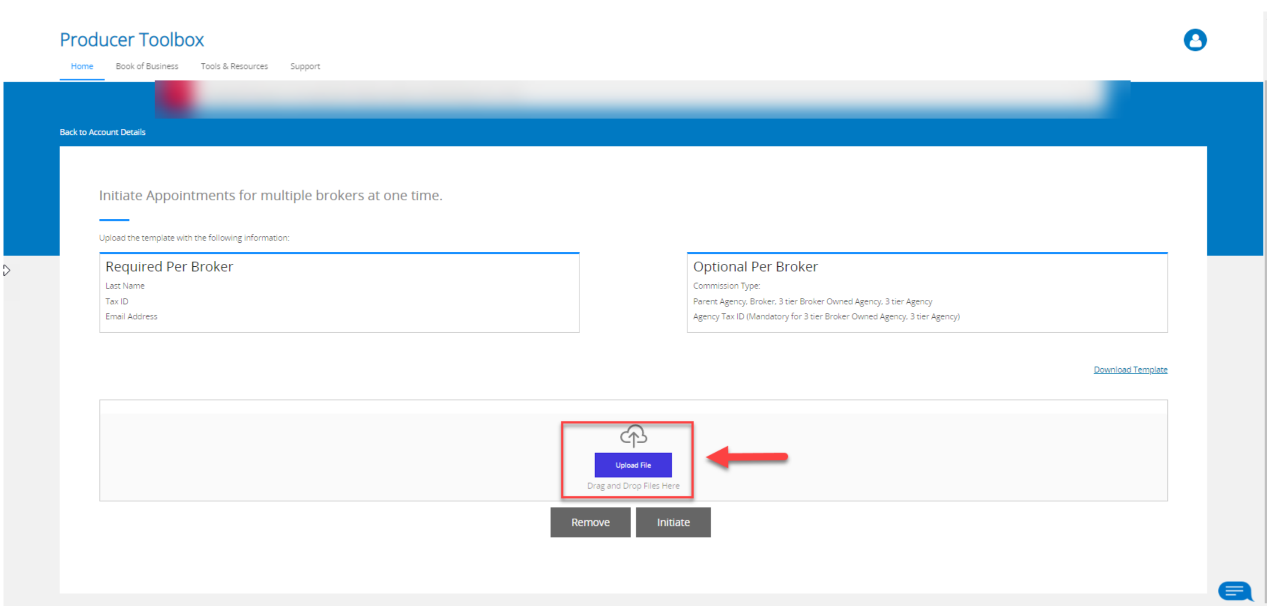
A	B	C	D	E
MANDATORY	MANDATORY	MANDATORY	OPTIONAL	Mandatory for 3 Tier Commission Types
Last Name	**Broker Tax ID**	**Email**	**Commission Type**	**Agency Tax ID**

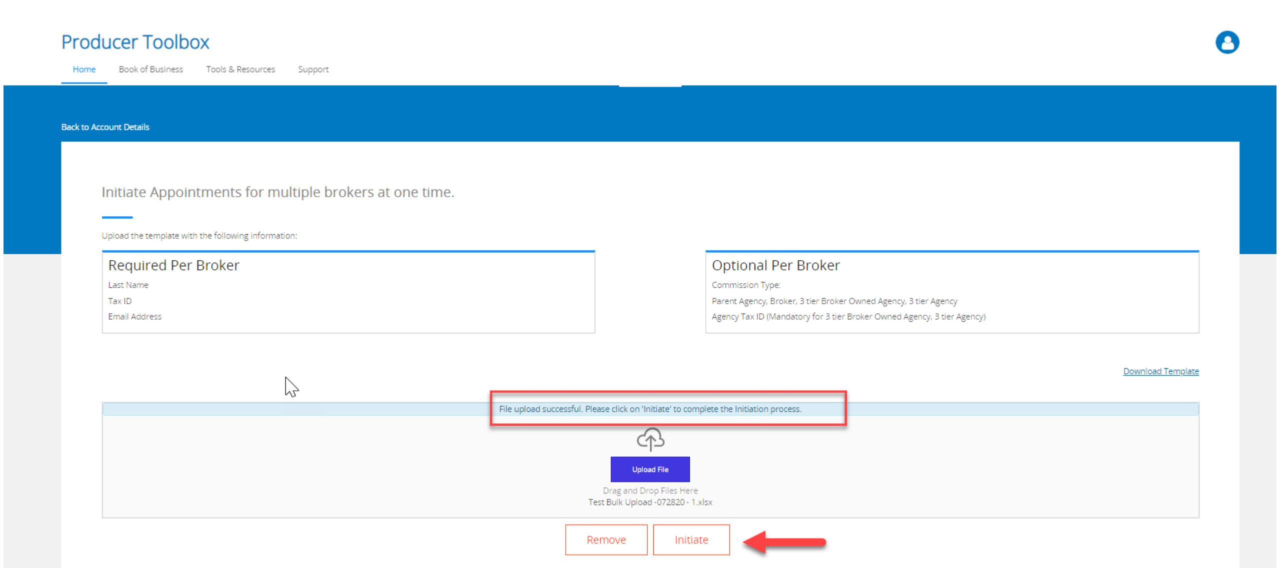
Instructions:
Please enter mandatory fields as per the specifications:
- **Last Name (Mandatory)** - enter only characters, - and ' allowed
- **Broker Tax ID (Mandatory)** - enter 9 digit number
- **Email (Mandatory)** - Enter correct format "xxxxxxxxxx@xxx.xx"
- **Commission Type (Optional)**- Select from dropdown
- **Agency Tax ID** - Mandatory for Commission types - 3 Tier Broker Owned Agency & 3 Tier Agency

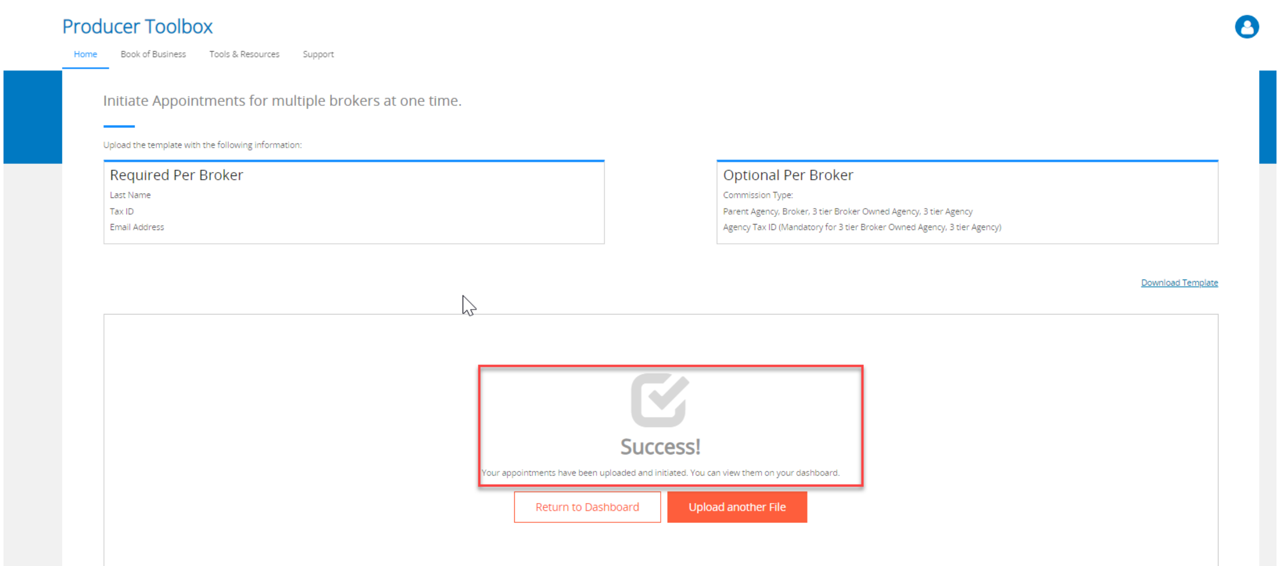
****Agency must have existing affiliation with Anthem**

Available commission types:
Parent Agency
Broker
3 Tier Broker Owned Agency
3 Tier Agency

Step	Action
11	Save the file in the required format (.xls or .xlsx) and upload the file



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>12</td><td>Once the file is uploaded, you will see a ‘File Uploaded Successfully’ message.
Click ‘Initiate’</td></tr>
<tr><td></td><td>


</td></tr>
<tr><td>13</td><td>After hitting ‘Initiate’, you will see a success message if all agents successfully processed or you will see a partial success message with a list of failed records that were not successfully processed. Any failed records need to be updated and resubmitted.


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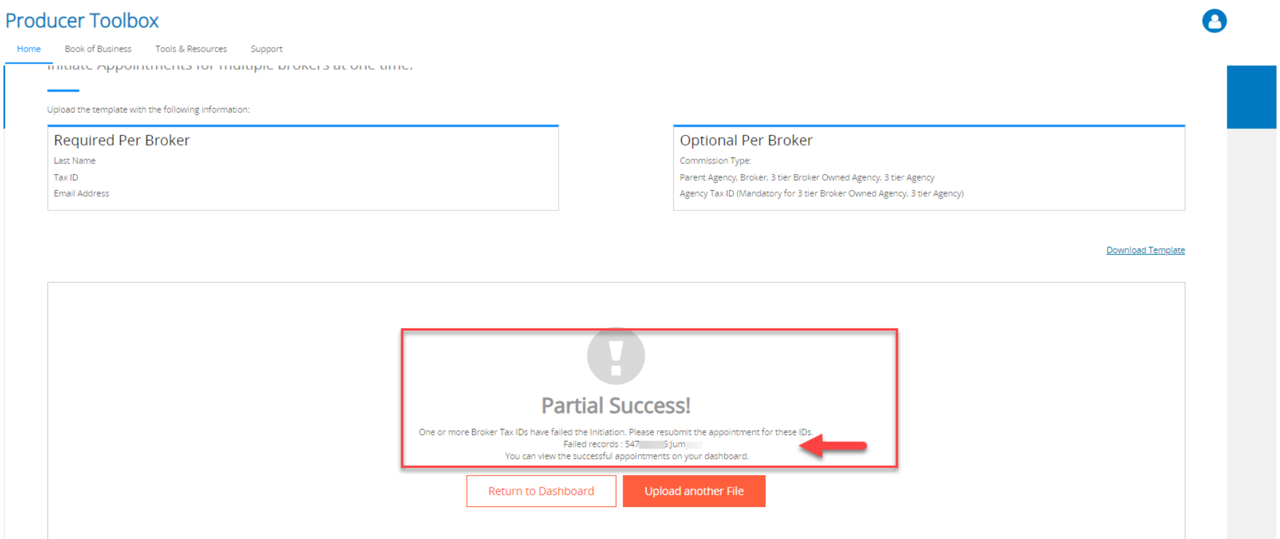
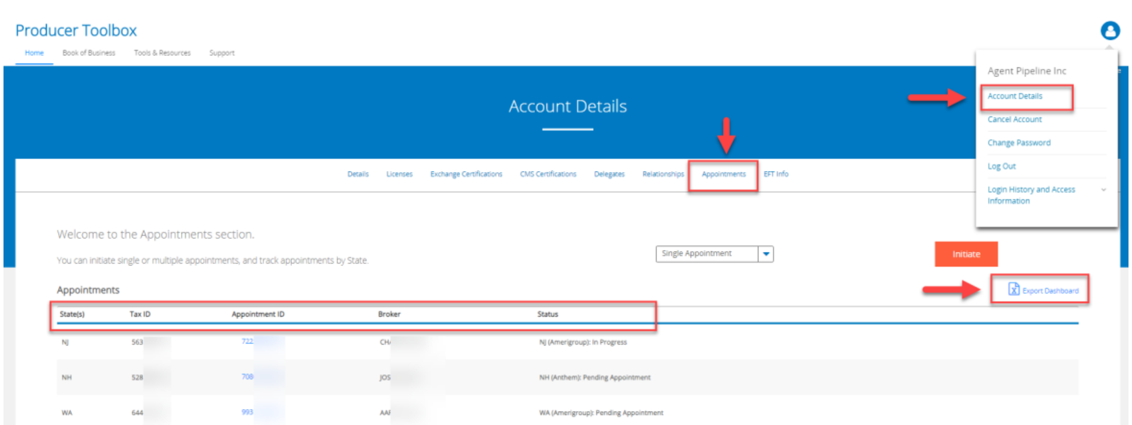
<tr><td></td><td>
</td></tr>
<tr><td>14</td><td>Click ‘Return to Dashboard’ to see brokers who appointments were successfully initiated for on your dashboard.</td></tr>
</table>

Step	Action
	Agency Dashboard
1	- The agency dashboard appears under ‘**Account Details**’, ‘**Appointments**’ - Here you will see the status for appointment requests initiated by you. - You are also able to export the dashboard into excel by clicking on ‘**Export Dashboard**’. This will allow sorting of the data on the dashboard. **Note:** - Once a broker has logged in and complete the first two tabs of the appointment process (basic info and appointment tabs), you are able to click on the ‘**Appointment ID**’ hyperlink to see details related to that specific broker appointment. Prior to the broker completing those initial tabs, you will receive an error message when clicking on the appointment id hyperlink.



Dashboard Status Key

Dashboard Status	Internal Status
In Progress	Appointment Created
	Signature Pending
	Payment Pending
Submitted	Submitted
In Review	Background Check
	Licensing & Credentialing Review
Pending Appointment	Submitted to NIPR
Appointed	Appointed
Denied	Denied

Resources

- Contact Licensing & Credentialing by email at anthem.brokers@anthem.com 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