# 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.

## **Table of Contents**

	Section	Page
Ager	ncy (FMO, EMO, MGA) Admin Process	
	Logging In	2
	Creating Agency Delegates	3
	Initiating Appointment Process	4 - 10
	Agency Dashboard	11

# **Producer Toolbox Broker Onboarding - Agency Admin Process**

Step			Action		
1	Go to Anthem.com, click 'P	roducers' and 'Logir	'n		
				Log In Español	
	Individual & Family Medicare Medicai	d Employers Producers	Providers	Log In Español	
	Producers Overview			X	
	Blass and Ban San	<b>6</b> iiiiiii	B		
	Plans and Services	Communications	Resources		
	Start Selling Anthem Medical	Contact Us News	Find Care Find a Form		
	Dental & Vision	Public Policy	Dental Online Services		
	Life & Disability	r done r oney	Login		
	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		have a Producer Toolk	pox account, enter your	
	username/password and cl				
	If you are an existing broke				egister now
	If you are a new broker or a	igency, click off go to		your state	
	Pro	ducer Toolbo	x		
	Registered	Brokers Log	g in Here		
	Nots	igned up? Register now >			
	Nots	igned up: Register now ,			
	Username				
	Password				
			٢		
		Log In			
	Forgot Us	ername or Forgot Passw	ord >		
	Need information on Ant us? Go to th	nem products or about Producer site for your			
	Contact	Us Terms & Conditio	ons		
				•	

Admin Portion – Agency Onboarding Process

Step	Action
	Creating Agency Delegates
1	Click on the profile icon, 'Account Details', 'Delegates', 'Create New Delegate'
	Producer Toolbox
	Book of Business Tools & Resources Support
	New Products Available
	Account Details
	Details Licenses Exchange Certifications CMS Certifications Delegates Relationships Appointments EFT info
	Create New Delegate
	Producer Toolbox
	Book of Business Tools D Resources Support
	(Return to Accust Details
	Ī
	Delegate Information
	For Name         Last Name         Brail Address           Forstname         Last name         Email
	Login Credentials
	Uvename Password Reventer Password
	Lear-name passeord Gorden passeord
	Access Level O Maintume: A delegate with Minnum Access cannot view sectors of the web size related to your business. A Minnum
	Access user can toll order supplies, create proposals and view plan information, as well as view other general content. O Moderate: A delegate with Moderate Access can view all sections of the web site except your online commission
	statements. This includes application status and memorismo details. O Rult: A delegate with Rul 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:
	<ul> <li>Primary Users and Site Admin Users with Full Access can initiate appointments</li> </ul>
	- Each agency can only have one <b>Primary User</b>

Step	Action	
	Initiating an Appointment	
	Note: Broker appointments under an FMO, EMO, or MGA agency must be initiated by t	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 Login History and Access
	Clients 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	
	Producer Toolbox	0
	Home Book of Business Tools & Resources Support	New Products Available
	A second Data la	New Products Available
	Account Details	
	Details Licenses Exchange Centifications CLVIS Centifications Delegates Relationships Appointments EFT Info	
	Welcome to the Appointments section	
	Welcome to the Appointments section. You can initiate single or multiple appointments, and track appointments by State.	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)
	<ul> <li>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).</li> </ul>
	Producer Toolbox           Book of Business         Tools & Resources         Support
	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 ' <b>Initiate Appointment'</b> , 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 ' <b>Continue to Select Commission and State</b> ', select all state(s) the broker should request an appointment for and/or the commission payment structure from the ' <b>Send Commission To</b> ' dropdown box then click ' <b>Initiate Appointment</b> '
	Note:
	<ul> <li>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.</li> </ul>

Step	Action					
	Producer Toolbox					
	Book of Busines Tools & Resources Support					
	Initiate Appointment					
	Note: Only states where the broker is					
	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     Colorado     Colorado     Anthem					
	O Missouri Arthem					
	O Nevada Anthem					
	You can specify where you would like your commission sent.					
	Select Commission for					
	Parent Agency Broker Broker Booker Back to Basic Information Instate Appointment					
	3 Titer Broker Owned Agency 3 Titer Agency					
	The ' <b>Commission Paid To</b> ' 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.					
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 Bauers         total A ferrours         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
	Deskil     Learners     Exchange Certifications     Oxit & Delegans     Restrontings     Appointments       Welcome to the Appointments Section.     Image: Certification of the Appointments by State.     Image: Certification of the Appointments by State.     Image: Certification of the Appointments by State.       Vou can instate single or multiple appointments, and track appointments by State.     Single Appointment     Image: Certification of the Appointments       Appointments     Multiple Appointments     Single Appointment     Image: Certification of the Appointments
9	Select "Download template" The excel template "BulkUploadTemplate_OptOut" or "BulkUploadTemplate_OptIn" should download
	Producer Toolbox Home Book of Business Tools & Resources Support
	Initiate Multiple Appointments
	Bok tis Account Details Initiate Appointments for multiple brokers at one time. Upoas the templase with the following information:
	Required Per Broker     Optional Per Broker       Lar. Name     Commission Type:       Tax. ID     Parent Agency, Itomer, Ster Broker Owned Agency, 3 ter Agency       Email Address     Agency Tax. ID (Manazovy for 3 ter Broker Owned Agency, 3 ter Agency)

Image:				Action						
MANDATORY       MANDATORY       Instructions:         Last Name       Broker Tax ID       Enail       Flags enter mandatory fields as per the specifications:         Last Name       Participation:       - Last Name (Mandatory) - enter on characters:, and ' allowed'         Last Name       - Broker Tax ID (Mandatory) - enter on characters:, and ' allowed'         Last Name       - Broker Tax ID (Mandatory) - enter on characters:, and ' allowed'         Last Name       - Broker Tax ID (Mandatory) - enter on characters:, and ' allowed'         Opt-In Template – Agencies setup to offer direct pay to brokers         Matter Name       - State Name         Matter Name <th>Enter data</th> <th>in the required</th> <th>fields</th> <th></th> <th></th> <th></th> <th></th>	Enter data	in the required	fields							
MANDATORY       MANDATORY       Instructions:         Last Name       Broker Tax ID       Enail       Flags enter mandatory fields as per the specifications:         Last Name       Participation:       - Last Name (Mandatory) - enter on characters:, and ' allowed'         Last Name       - Broker Tax ID (Mandatory) - enter on characters:, and ' allowed'         Last Name       - Broker Tax ID (Mandatory) - enter on characters:, and ' allowed'         Last Name       - Broker Tax ID (Mandatory) - enter on characters:, and ' allowed'         Opt-In Template – Agencies setup to offer direct pay to brokers         Matter Name       - State Name         Matter Name <td colspan="10">Opt-Out Template – Agencies not setup to offer direct pay to brokers</td>	Opt-Out Template – Agencies not setup to offer direct pay to brokers									
Last Name       Broker Tax (D)       Email       Instructions:         Image: Control of the state of t				oner uneer pay	to brokers					
Please enter manatory fields as per the second seco			MA		Instruc	tions				
Image: Section of the section of th	Last Name			Linan	Please	enter mai	ndatory fields as per the			
Commission Type - Parent Agence     Commission Type - Parent Agence     Central Control of Con							andatory) - enter only			
Image: Section 1       Image: Section 1 <td< td=""><td></td><td></td><td></td><td></td><td>charact</td><td>ters, - and</td><td>' allowed</td></td<>					charact	ters, - and	' allowed			
Image: Control of Contro					Broker Tax ID (Mandatory) - enter 9 dig number					
Commission Type - Parent Agence     default										
					(defau	lt)				
MANUALTORY       MANUALTORY       OPTIONAL       Manualtory for Hier Commission Type       Instructions         Last New       Folder Fair D       Ensilt       Commission Type       Agency Tax D       Performance         Instructions       Final       Commission Type       Agency Tax D       Performance         Instructions       Instructions       Performance       Performance       Performance         Instructions       Performance       Instructions       Performance       Performance         Instructions       Performance       Performance       Performance	Opt-In Tem	plate – Agencie	es setup to offer	direct pay to bro	kers					
and Hume     Noder Tax ID     Enabl     Commission Type     Ageory Tax ID     Instructions: Procession of the sector secto	A MANDATORY N	5 MANDATORY	MANDATORY			on Types	G			
A service of the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the required format (.xls or .xlsx) and upload the file     Seve the file in the device     Seve th	Last Name B	roker Tax ID	Email	Commission Type			Please enter mandatory fields as per the			
Image: Section of the sec							<ul> <li>Last Name (Mandatory) - enter only</li> </ul>			
Image: State in the indication of the product of the pr							"xxxxxxxxxx@xxxx.xx"			
Agency <							dropdown • Agency Tax ID - Mandatory for Comm			
with Authen   With Authen   Available constraints types:   Present Agency   Bits file in the required format (.xls or .xlsx) and upload the file   Save the file in the required format (.xls or .xlsx) and upload the file   Vite work over   Producer Toolbox   Vite work over   Producer Toolbox Vite work over Vite work over Producer Toolbox Vite work over Vite work over Producer Toolbox Vite work over Vite work over Producer Toolbox Vite work over over Vite work over Vite work over over Vite work ov										
in i										
Image: Contract of the second of										
Save the file in the required format (.xls or .xlsx) and upload the file							3 Tier Broker Owned Agency			
Image: Section of the sec							3 Her Agency			
Initiate Appointments for multiple brokers at one time. Topad template with the following information:	Producer	Toolbox		r .xlsx) and upload	d the file		C			
Initiate Appointments for multiple brokers at one time. Topad template with the following information:										
Update temptate with the following information:         Product Per Broker         Unit with the Maximum         That Advises         Diplomed per Council Agency, 3 tier Agency         Constant Tier Date To Owned Agency, 3 tier Agency         Devine Tier Date To Owned Agency, 3 tier Agency         Devine Tier Date To Owned Agency, 3 tier Agency	Back to Account Deta	ls								
Required Per Broker         Last Name         Tar ID         Brail Address             Dynamical Per Broker             Commission Type:         Parent Agency, Broker, 3 ter Agency, 4 tervater	Initiat	e Appointments for multiple	brokers at one time.							
Last Name Ta ID Ta ID Email Address Commission Type: Pareta Agency, 3 tier Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Commission Type: Pareta Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Agency Ta ID (Mandacoy for 3 cer Droker Owned Agency, 3 tier Agency) Commission Type: Pareta Agency Commission Type: Pareta Agency Comm	Upload the	template with the following information:								
Ta ID Erail Address Deventagency, 3 ser Agency Tax ID Mandatory for 3 ser Broker Owned Agency, 3 ser Agency Deventagency Devency Devency Devency Devency Devency Devency Devency Devency Devency Devency Devency Devency Devency Devency Devenco Devency Devency Devency	v .									
Lipse Tre Drag and Drop Files Here		dress								
Lipse Tre Drag and Drop Files Here							Download Template			
Uptoor Fix Drag and Drop Files Here										
Drag and Drop Files Here										
Remove Initiate										
				Remove Initiate						

Admin Portion – Agency Onboarding Process

Step	Action
12	Once the file is uploaded, you will see a 'File Uploaded Successfully' message.
	Click 'Initiate'
	Producer Toolbox  Home Book of Business Tools & Resources Support
	Back to Account Details
	Initiate Appointments for multiple brokers at one time.
	Upload the template with the following information:  Required Per Broker  Optional Per Broker
	Last Name Commission Type:
	Tax ID     Parent Agency, Broker, 3 ter Broker Owned Agency.       Emeil Address     Agency Tax ID (Mendatory for 3 ter Broker Owned Agency).
	File upload successful. Please click on Initiate' to complete the Initiation process.
	दंभ्
	Liptoud File Drag and Drop Files Here
	Test Buik Upload-072820 - 1.xtox
	Remove Initiate
13	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.
	Producer Toolbox
	Home Book of Business Tools & Resources Support
	Initiate Appointments for multiple brokers at one time.
	Upload the template with the following information:
	Required Per Broker Optional Per Broker
	Lass Name Commission Type: TaxID Faret Agency, Broker, 3 ter Agency
	Email Address Agency Tax ID (Mandatory for 3 tier Broker Owned Agency) 3 tier Agency ()
	Rownload Template
	PQ
	Success! Your appointments have been uploaded and initiated. You can view them on your distribution.
	Return to Dashboard Upload another File
I	

Step	ep Action	
	Home       Book of Business       Tools & Resources       Support         Initiation of pupport interfers for interface of order order of order	0
	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
		Download Template
	Partial Success! Deter Tax IDs have failed the initiation. Plases resubinit the appointment for these IDs Partiel records : 54111115 Junit You can view the successful appointments on your distributed. Return to Dashboard Upload another File	
14	Click ' <b>Return to Dashboard'</b> to see brokers who appointments were successfully dashboard.	initiated for on your

Agency Dashb	board		
<ul><li>Here you</li><li>You are al</li></ul>	will see th lso able to	pard appears under ' <b>Account Details'</b> , ' <b>Appointmer</b> the status for appointment requests initiated by you be export the dashboard into excel by clicking on ' <b>Ex</b> ng of the data on the dashboard.	u.
<ul> <li>Note:         <ul> <li>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 'Appoin ID' hyperlink to see details related to that specific broker appointment. Prior the broker completing those initial tabs, you will receive an error message when complete the appointment id hyperlink.</li> </ul> </li> </ul>			n the <b>'Appointm</b> ment. Prior to th
Producer Toolbox			
Home Book of Business Tools & Re	sources Support	Account Details	Agent Pipeline Inc Account Details Cancel Account Change Password
<b>}</b>			
		Details Licenses Bicharge Certifications OLIS Certifications Delegates Relationships Apparenents BT Info	Log Out Login History and Acces Information
Welcome to the Appo You can initiate single or mul	Intments section. tiple appointments, and track a		-
You can initiate single or mul		appointments by State.	-
You can initiate single or mul	tiple appointments, and track a	appointments by State.	
You can initiate single or mul	tiple appointments, and track a	i apportmenta by State.	-
Vou can initiate single or mul Appointments No 544 No 528 No 644	Appointments, and track a Appointment to 722 700 973	Isingle Appointment	-
You can initiate single or mul	Appointments, and track a Appointment to 722 700 973	Isingle Appointment	-
Vou can initiate single or mul Appointments Sistesto Tarito N 560 N 5	Appointments, and track a Appointment ID 722 700 939 atus Key	Apportments by State.	-
Vou can initiate single or mul Appointments No 545 No 558 No 644	Appointments, and track a Appointment ID 722 700 939 atus Key	Aspontments by State.	-
vou can initiate single or mul Appointments Sinstein Tarito N 550 N 5500 N 5500 N 5500 N 5500 N 5500 N 5500 N 5500 N 5500	Appointments, and track a Appointment ID 722 700 939 atus Key	Appointments by State.	-
Vou can initiate single or mul Appointments Sistesto Tarito N 560 N 5	Appointments, and track a Appointment ID 722 700 939 atus Key	Appointments by State.	-
vou can initiate single or mult Appointments Sinetion Taxio N 500 N	Appointments, and track a Appointment ID 722 700 939 atus Key	exponenteers by State.	-
vou can initiate single or mul Appointments Sinstein Tarito N 550 N 5500 N 5500 N 5500 N 5500 N 5500 N 5500 N 5500 N 5500	Appointments, and track a Appointment ID 722 700 939 atus Key	Accordements by State       Image: Accor	-
vou can initiate single or mult Appointments Sinetion Taxio N 500 N	Appointments, and track a Appointment ID 722 700 939 atus Key	exponenteers by State.	
Vou can initiate single or multiple         Appointments         Image: Specific single or multiple         Dashboard State         Dashboard State         In Progress         Submitted         In Review	Apportments, and track a Apportment 0 72 70 90 atus Key I Status	Accordences by Sate:	
Appointments         Summary         Dashboard State         Dashboard State         Submitted         In Review         Pending Apport	Apportments, and track a Apportment 0 72 70 90 atus Key I Status	exponenteers by Sate.	-
Vou can initiate single or multiple         Appointments         Image: Specific single or multiple         Dashboard State         Dashboard State         In Progress         Submitted         In Review	Apportments, and track a Apportment 0 72 70 90 atus Key I Status	Accordences by Sate:	-

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