

Standard Broker Onboarding Appointment Process

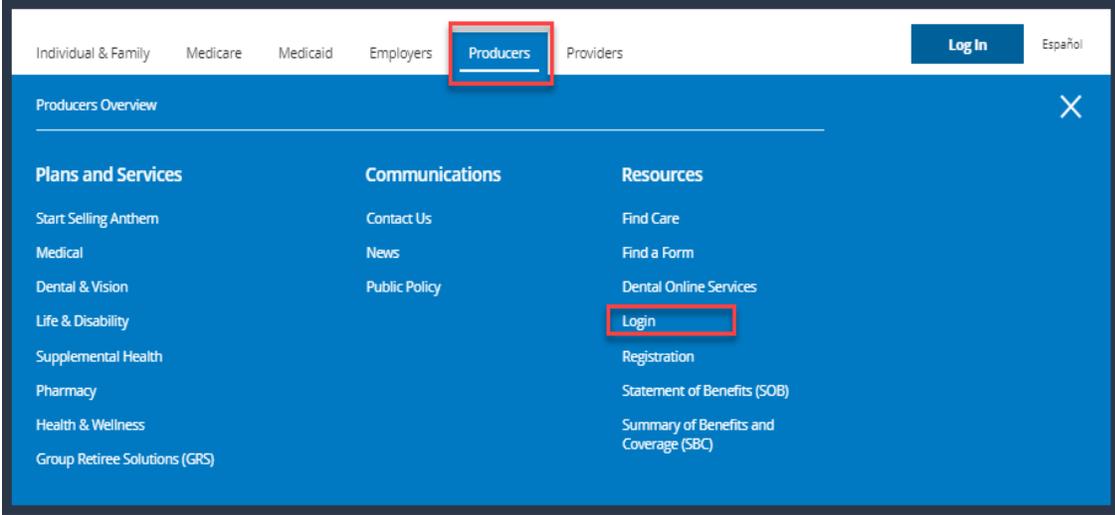
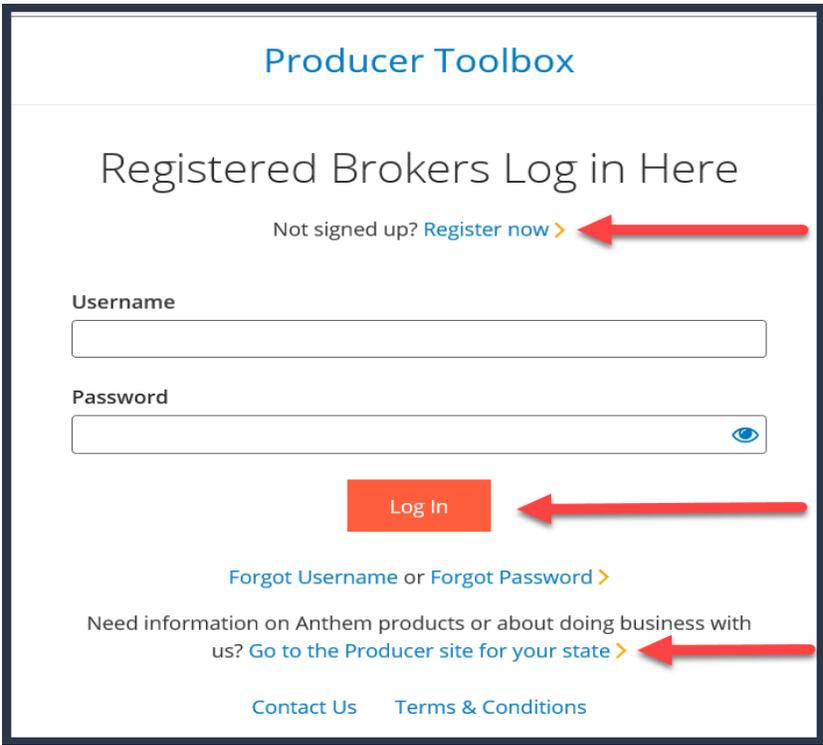
Purpose

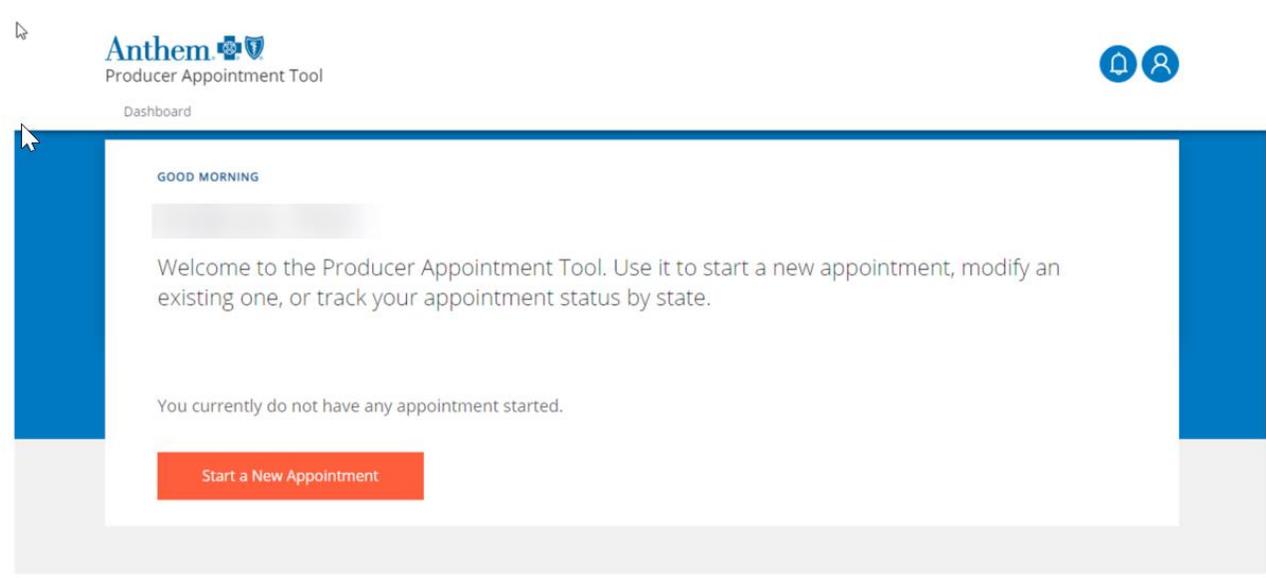
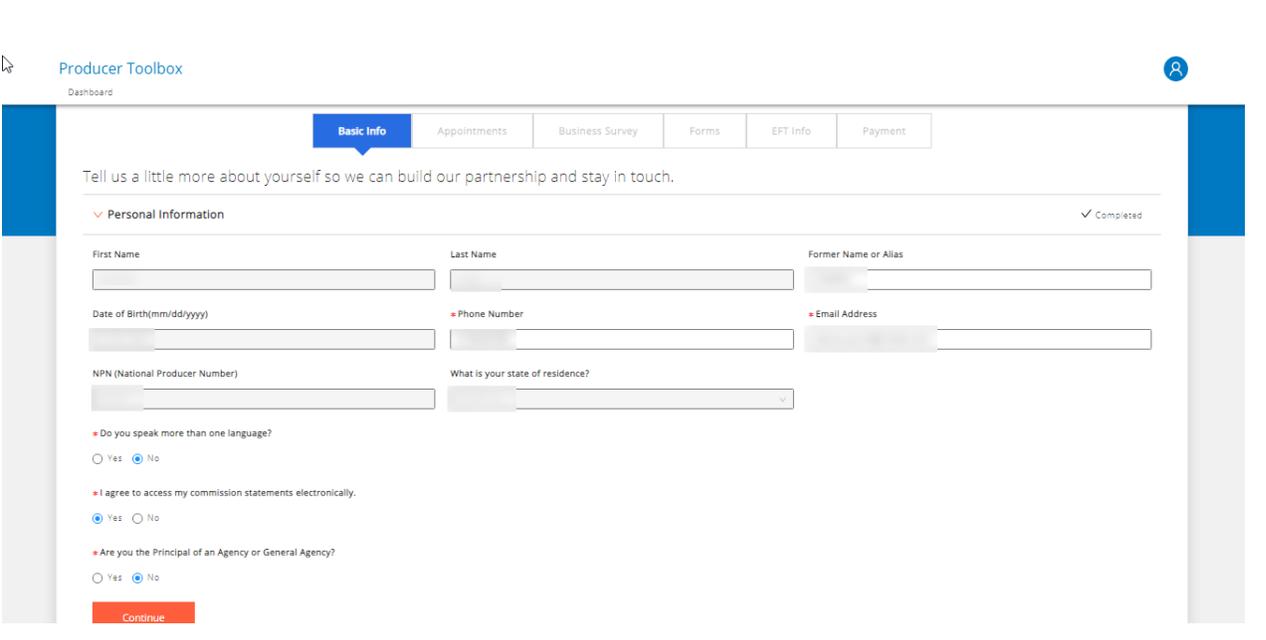
The purpose of this document is to provide detailed instructions to direct brokers and agencies regarding how to submit broker appointment requests. The process outlined in this document is for direct agents, agencies, and standard agency subagents.

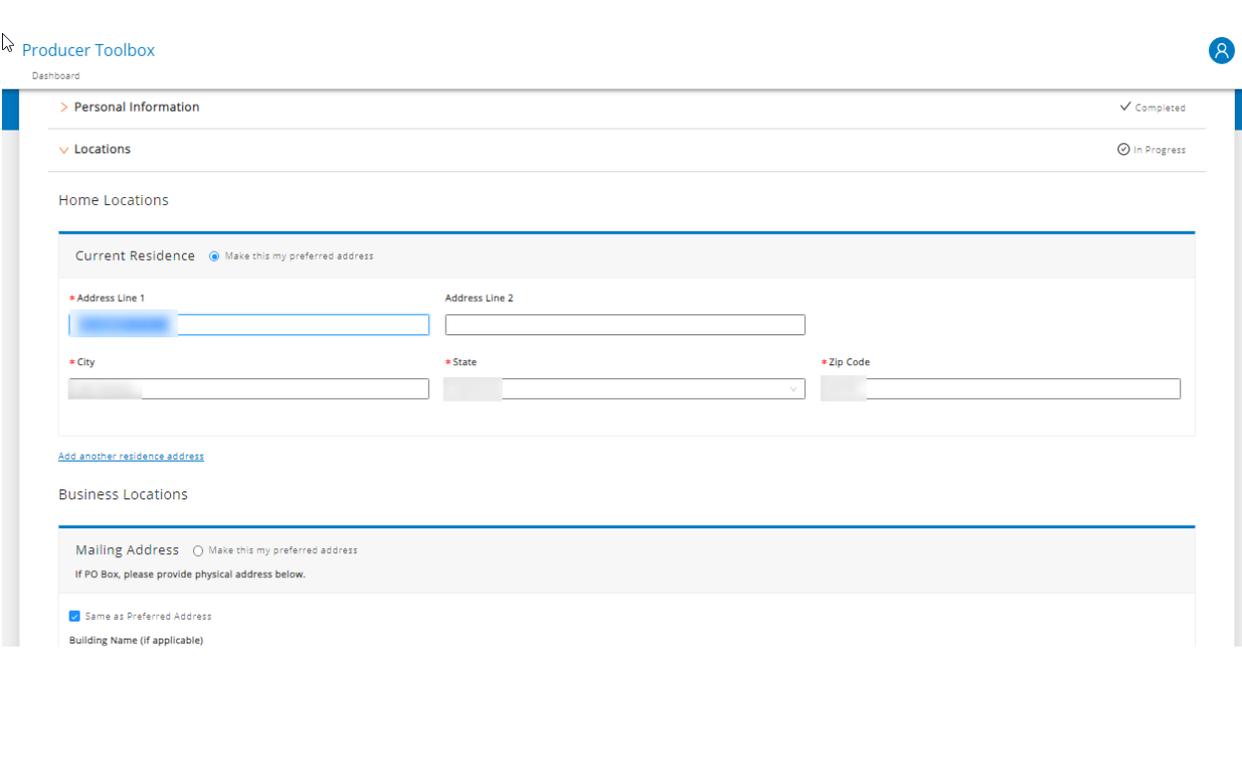
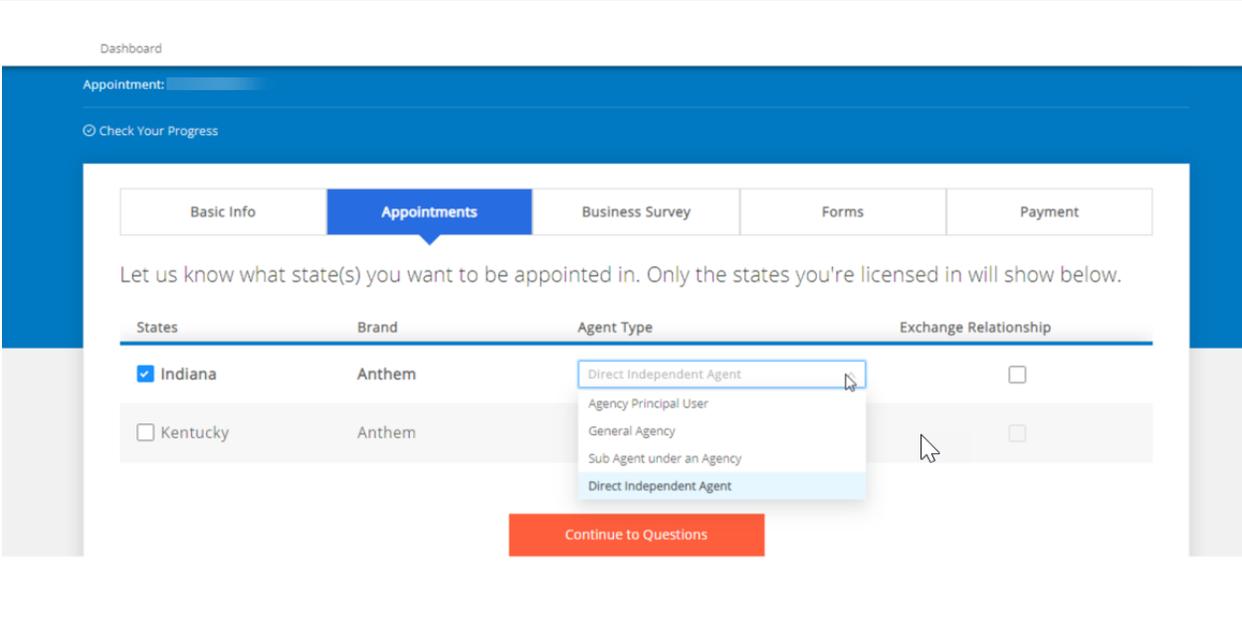
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Producer Toolbox Broker Onboarding Process – Standard Broker Onboarding

Step	Action
1	<p>Go to Anthem.com, click 'Producers' and 'Login'</p> 
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'
	 <p>The screenshot shows the 'Anthem Producer Appointment Tool' dashboard. At the top left is the Anthem logo and 'Producer Appointment Tool' text. Below it is 'Dashboard'. On the right are notification and user icons. The main content area has a 'GOOD MORNING' greeting, a blurred name, and 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.' Below this is the text 'You currently do not have any appointment started.' and a prominent red button labeled 'Start a New Appointment'.</p>
4	Enter/update your information in the required fields in the 'Basic Info' section and click 'Continue'
	 <p>The screenshot shows the 'Producer Toolbox' 'Basic Info' section. At the top is the 'Producer Toolbox' header and 'Dashboard' text. Below is a navigation bar with tabs: 'Basic Info' (selected), 'Appointments', 'Business Survey', 'Forms', 'EFT Info', and 'Payment'. The main content area starts with the text 'Tell us a little more about yourself so we can build our partnership and stay in touch.' followed by a 'Personal Information' section with a 'Completed' status. The form includes fields for '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?' (selected 'No'), 'I agree to access my commission statements electronically.' (selected 'Yes'), and 'Are you the Principal of an Agency or General Agency?' (selected 'No'). A red 'Continue' button is at the bottom.</p>
5	Enter your address information and click 'Continue to Appointments' when complete

Step	Action
	
6	<p>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'</p>
	
7	<p>Complete the questions in the Business Survey section. Provide any additional information and attach any required documents. Once completed, click 'Continue to Forms'</p>

Step	Action
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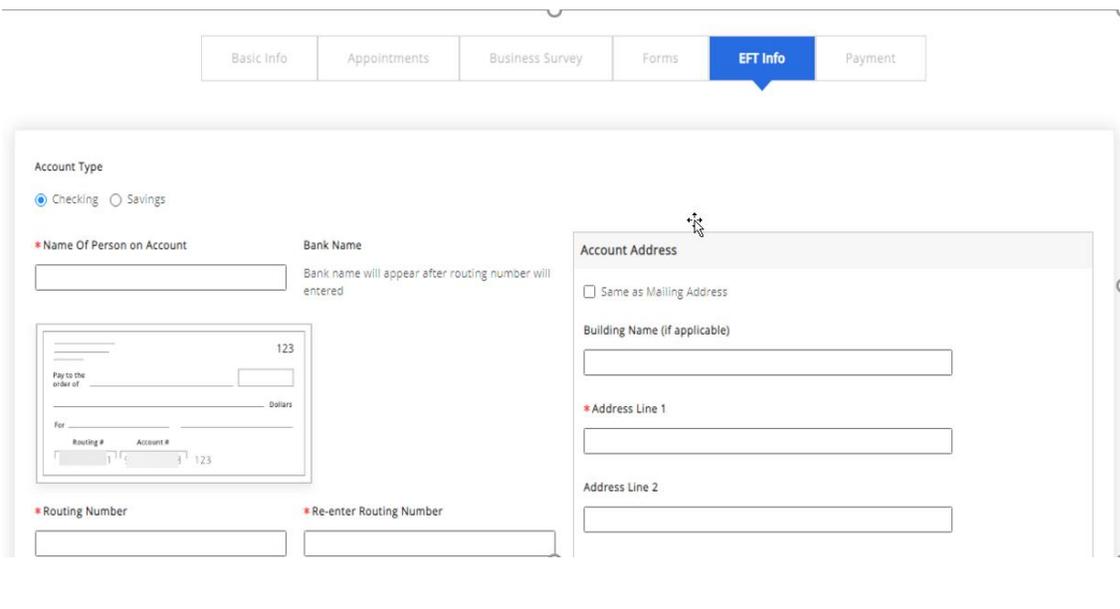
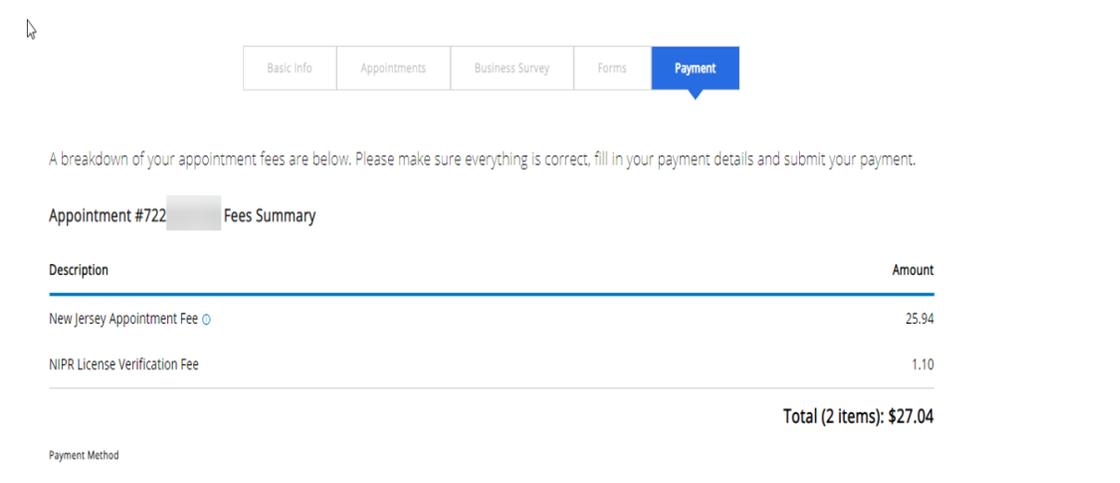
Step	Action
	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 10px;"> Basic Info Appointments Business Survey Forms EFT Info Payment </div> <p>Please answer all of the following questions.</p> <p>When answering "yes," Let us know any relevant details and the current status in the provided field.</p> <p>You can attach documents related to each question by clicking on the upload documents link.</p> <p>01. Have you ever had an insurance license, appointment, securities, registration or application denied, suspended, cancelled or revoked? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>02. Has any legal or regulatory body ever sanctioned, censured, penalized or otherwise disciplined you? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>03. Has any state or federal regulatory agency or self-regulatory authority ever filled a complaint against you? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>04. Have you ever been subjected to an insurance or investment related Consumer initiated Complaint or proceeding? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>05. Has a bonding or surety company denied, ever paid out on, or revoked a bond? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> </div>

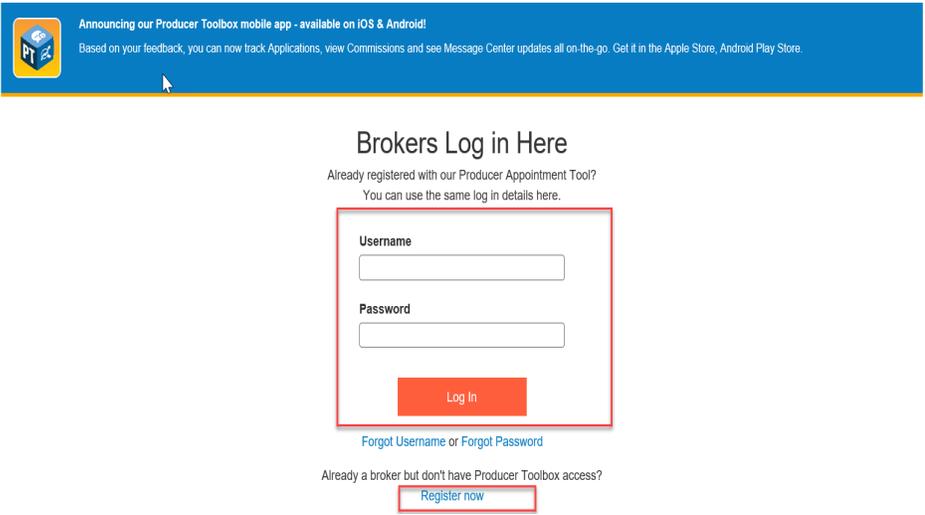
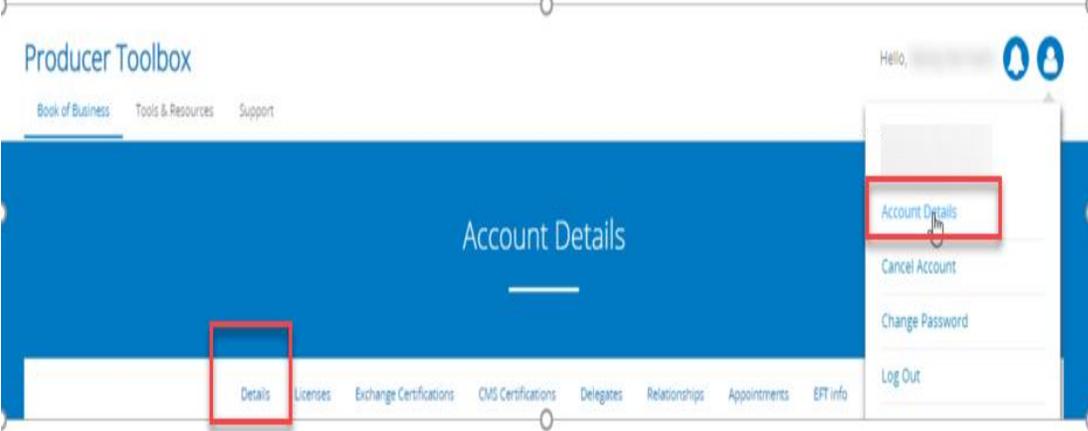
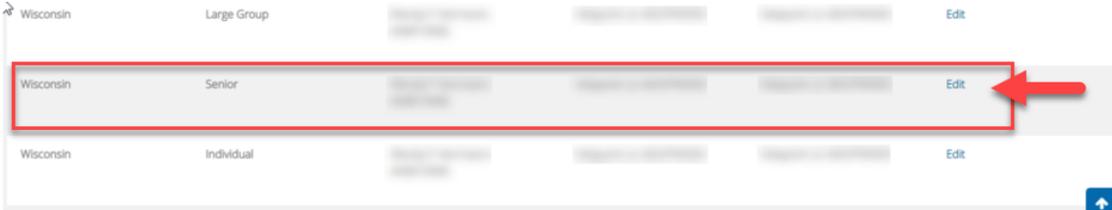
8 Complete all required Forms. Required forms will appear based on requested states and setup.

Step	Action									
	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 10px;"> Basic Info Appointments Business Survey Forms EFT Info Payment </div> <p>Please complete the forms for each state selected in the Appointments screen. If you need help along the way, contact Licensing and Credentialing at 1-877-304-6470 (9:00 AM - 4:30 PM ET)</p> <div style="display: flex; justify-content: flex-end; align-items: center; margin-bottom: 10px;"> 0/1 <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 5px;">Completed Forms</div> </div> <div style="display: flex; justify-content: center; margin-bottom: 10px;"> Overview CA(1) Summary </div> <p>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.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr> <th>Forms</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>California</td> <td>In progress</td> <td>Review</td> </tr> <tr> <td>Summary</td> <td>Not started yet</td> <td>Start</td> </tr> </tbody> </table> <div style="text-align: center; margin-bottom: 10px;"> Continue Forms </div> <div style="text-align: center;"> Back to Business Survey </div> </div>	Forms	Status	Action	California	In progress	Review	Summary	Not started yet	Start
Forms	Status	Action								
California	In progress	Review								
Summary	Not started yet	Start								

9 Click 'I Acknowledge' and 'Back to Overview' once all forms show completed

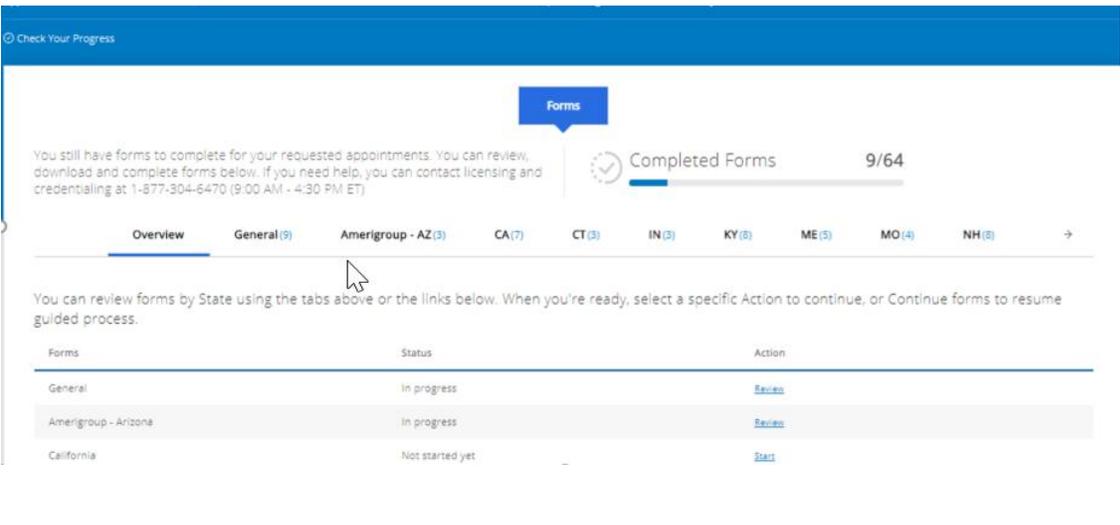
Step	Action
	<div style="border: 1px solid #ccc; padding: 10px;"> <p>the subject of an involuntary bankruptcy petition?</p> <p>h. Are there any unsatisfied judgments, garnishments, or liens against you for: Child Custody, Student Loans, IRS liens on a house? No</p> <p>i. Are you in debt to any insurance company? No</p> <p>j. Have you ever been indicted for, convicted of, or pled guilty or nolo contendere to any felony or misdemeanor other than a minor traffic offense? No</p> <p>k. Are you currently party to any litigation or the subject of any investigations? No</p> <p>l. 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? No</p> <hr/> <p>Note: In case of any changes required please navigate to the respective section to make necessary edits</p> <div style="text-align: center; margin-top: 20px;"> I Acknowledge </div> <div style="text-align: center; margin-top: 10px;"> Back to Overview </div> </div>

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" data-bbox="243 1344 1136 1575"> <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 colspan="2" style="text-align: right;">Total (2 items): \$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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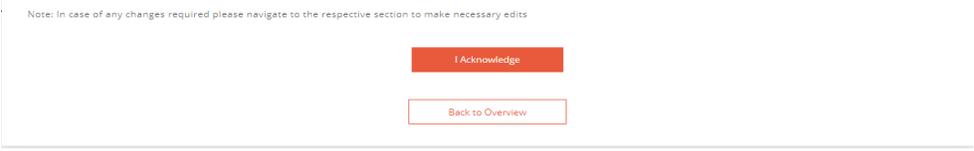
Step	Action
1	Broker or Agency Changing an Existing Relationship Log into Producer Toolbox https://brokerportal.anthem.com/apps/ptb/login Register if new to Producer Toolbox or login if existing Producer Toolbox user
	<p>Producer Toolbox</p> 
2	Click the profile icons and 'Account Details'
3	Scroll down to the appropriate state and relationship combination. Click 'Edit' to change the relationship setup.
	
	

4 Select the desired change. Click 'Save Changes'

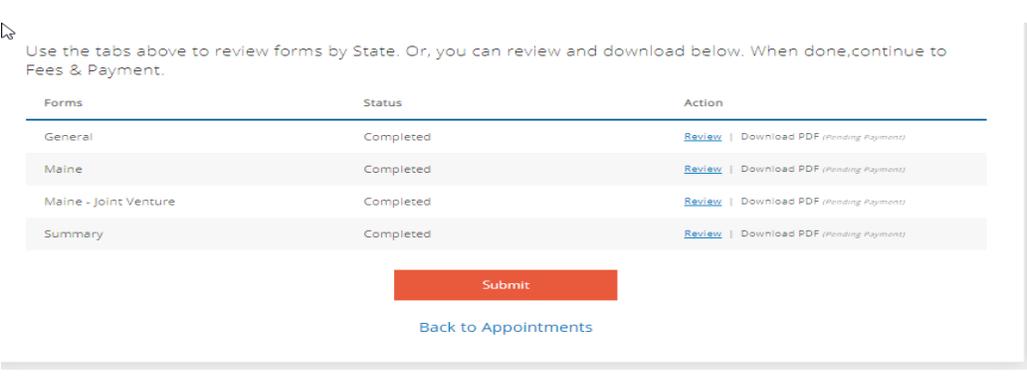
5 Complete any required forms, if applicable, based on the selected change



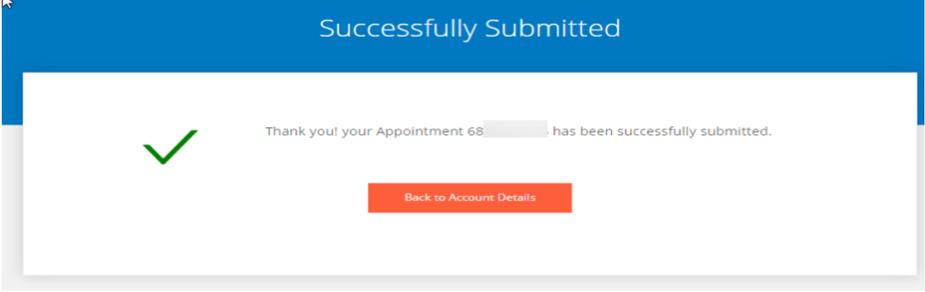
6 Click 'I Acknowledge' and 'Back to Overview' once all forms show completed

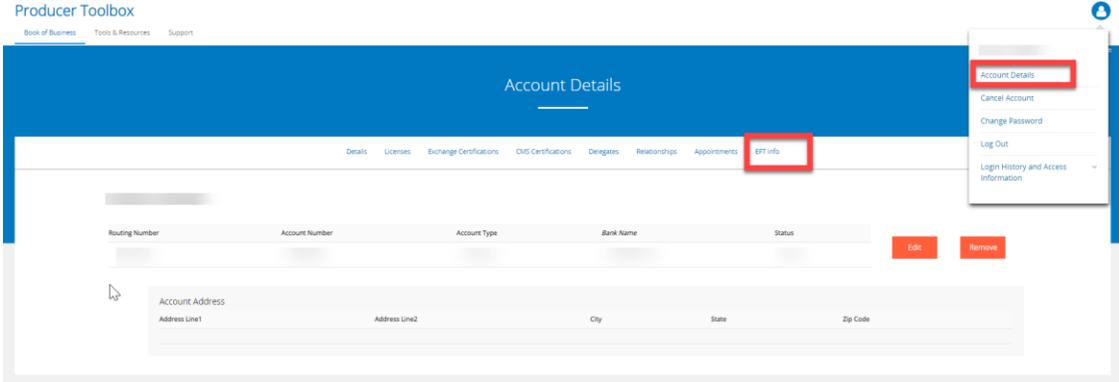


7 Click 'Submit'



8 A confirmation screen will appear with a button to return 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
	<p data-bbox="212 352 412 380">Producer Toolbox</p> <div data-bbox="305 436 1320 531">  <p data-bbox="402 449 837 468">Announcing our Producer Toolbox mobile app - available on iOS & Android!</p> <p data-bbox="402 472 1308 491">Based on your feedback, you can now track Applications, view Commissions and see Message Center updates all on-the-go. Get it in the Apple Store, Android Play Store.</p> </div> <div data-bbox="727 562 1068 947"> <h3 data-bbox="748 562 1016 594">Brokers Log in Here</h3> <p data-bbox="711 600 1052 619">Already registered with our Producer Appointment Tool?</p> <p data-bbox="756 621 1006 640">You can use the same log in details here.</p> <div data-bbox="727 642 1068 863" style="border: 1px solid red; padding: 5px;"> <p data-bbox="751 663 821 682">Username</p> <input data-bbox="751 688 1008 716" type="text"/> <p data-bbox="751 732 821 751">Password</p> <input data-bbox="751 758 1008 785" type="password"/> <p data-bbox="857 821 902 840" style="text-align: center;">Log In</p> </div> <p data-bbox="756 867 984 886" style="text-align: center;">Forgot Username or Forgot Password</p> <p data-bbox="704 900 1058 919">Already a broker but don't have Producer Toolbox access?</p> <p data-bbox="824 921 911 940" style="text-align: center;">Register now</p> </div>
2	<p data-bbox="201 989 740 1008">Click the profile icons, 'Account Details', 'EFT info'</p> <p data-bbox="250 1020 699 1047">- Add, edit, or remove EFT information</p> <div data-bbox="201 1115 1320 1497">  <p>The screenshot shows the 'Account Details' page in the Producer Toolbox. A navigation menu at the top includes 'Details', 'Licenses', 'Exchange Certifications', 'CMS Certifications', 'Delegates', 'Relationships', 'Appointments', and 'EFT info', with 'EFT info' highlighted by a red box. On the right, a profile dropdown menu is open, with 'Account Details' highlighted by a red box. Below the menu, there are input fields for 'Routing Number', 'Account Number', 'Account Type', 'Bank Name', and 'Status', with 'Edit' and 'Remove' buttons. A second set of input fields is for 'Account Address', including 'Address Line1', 'Address Line2', 'City', 'State', and 'Zip Code'.</p> </div>
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