Thanks,

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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# 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 [producers@elevancehealth.com](mailto:producers@elevancehealth.com) or by phone at 1-877-304-6470.
* Tech Support – email to [software.support@elevancehealth.com](mailto:software.support@elevancehealth.com) or by phone at 888-268-4361.

# Logging In/Creating an Account

| **Step** | **Action** |
| --- | --- |
| 1 | Click this direct link: <https://brokerportal.anthem.com/apps/ptb/login>  After you enter the link, if you are already registered, select, “Log in now” as shown below |
| 2 | Register and/or login page appears   |  |  | | --- | --- | | **If:** | **Then:** | | **You are a new broker** | **Proceed to Step 3** | | **You are an existing broker and you do not have a Producer Toolbox account** | **Proceed to Step 7** | | **You are an existing broker and you have a Producer Toolbox account** | **Proceed to New Broker Appointment Section** | |
| 3 | New Broker - Click on “Register Now” to get registered. |
| 4 | Enter your SSN and select Next. |
| 5 | Populate all fields and click “Create Account”:  **Please note**:   * Tax ID must be 9 characters in length * Brokers must register using their own Tax ID (TIN). If a Principal of an Agency, Principal must register using their own Tax ID (TIN) and not the agency’s Tax ID (FEIN).   User Name rules:   * Username needs to be between 6-20 characters & only letters, numbers or the @ symbol are allowed. * Username shouldn't start with a number or include spaces.   Password rules:   * Your Password must be more than 8 letters or numbers and should be limited to length 20.   C:\Users\8445MU\AppData\Local\Temp\1\SNAGHTML9b70483.PNG |
| 6 | Successful prompt will appear, click “Log in Now”:    Proceed to Step 17. |
| 7 | If you have an active contract, but have not registered, click on “Register Now” |
| 8 | Enter your SSN and select Next. |
| 9 | Click on “Next”: |
| 10 | Click on “I Agree”: |
| 11 | |  |  | | --- | --- | | **If an agency** wants to register, select the radial button “Register as an Agency”  Populate fields as follows:   * First Name = Principal’s First Name * Last Name = Principal’s Last Name * Agency Name = Agency Name * Tax ID Number = Agency’s TIN * Email = Email address on file in our licensing system for the agency   Click “Next” and proceed. After the agency is registered they can assign delegates  cid:image008.jpg@01D65C1E.FD6DE3E0 | **If a direct agent, subagent or principal of an agency** wants to register, select the radial button “Register as an Independent Agent”  Populate fields as follows:   * SSN/Tax ID  = direct agent or subagent’s TIN * Email = Email address on file in our licensing system for the direct agent or subagent   Click “Next” and proceed.  cid:image015.jpg@01D65C1E.FD6DE3E0 | |
| 12 | Confirm your information is correct:   * If information is correct, click “Next” * 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 |
| 13 | Create your username, then click “Next”  User Name rules:   * Username needs to be between 6-20 characters & only letters, numbers or the @ symbol are allowed. * Username should not start with a number or include spaces.   Password rules:   * Your Password must be more than 8 letters or numbers and should be limited to length 20.   C:\Users\dickejn\AppData\Local\Temp\1\SNAGHTML243df7d9.PNG |
| 14 | Select and answer the 1st security question then click “Next” |
| 15 | Select and answer the 2nd security question and click “Create Account”: |
| 16 | Following message will appear: |
| 17 | Once you receive your email with your temporary password, click on the link “here”. You will be directed to the portal.  C:\Users\8445MU\AppData\Local\Temp\1\SNAGHTML1f5ce602.PNG |
| 18 | Portal log in will appear:  C:\Users\dickejn\AppData\Local\Temp\1\SNAGHTML243fbb82.PNG |
| 19 | Enter your “Username” and the temporary password you were issued and click “Log In”:  C:\Users\dickejn\AppData\Local\Temp\1\SNAGHTML243fbb82.PNG |
| 20 | Enter:   1. Temporary password – supplied on the email you received 2. Create a new password 3. Confirm your new password 4. Click “Login” |
| 21 | Ensure the “agree” checkbox is flagged and click “Submit” |
| 22 | You may get started on submitting new appointment requests. |

# New Broker Appointment

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| **Step** | **Action** |
| 1 | Log in   1. enter your username 2. enter password 3. click login   **Note**: Do not use your agency information to log in |
| 2 | Once logged in, click the ‘**Self Initiated**’ tab and ‘**Start a New Direct Appointment**’ |
| 3 | Populate the required fields (fields with red asterisk) all other fields are prepopulated.  Answer the three questions:   * Do you speak more than one language? * I agree to access my commission statements electronically? * Yes = paper statements will not be mailed * No = paper statements will be mailed * Are you the Principal of an Agency or General Agency? * Yes = you are requesting your agency to be contracted/appointed * No = you are not requesting your agency to be contracted/appointed   Click “**Continue**” |
| 4 | Enter your Home, Business and Physical Locations:  **Note:** If your Business address is a P.O. Box, please provide a Physical Location  Click “**Continue to Appointments**”  C:\Users\8445MU\AppData\Local\Temp\1\SNAGHTML391656a1.PNG |
| 5 | 1. Select the state/brand combinations you would like to be appointment/contracted in.     1. Filters are available for State, Brand and Line of Business to use when making selections. 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.    1. FL Agents can now be appointed as PPA in Unicare (IND, SMGP, LGGP) but must be submitted as a separate appointment from FL Simply (Senior). 3. Then select ‘Select an Agent Type’ for each of the selected Markets.   Drop down definitions:   * Direct Independent Agent = Broker/Producer who does not work under an agency and commissions are paid directly to the Broker/Producer. * Sub Agent under an Agency = Broker/Producer who works under an agency and commissions are paid to the agency. When this option is selected, a field will appear for you to enter the agency TIN (tax identification number).   + For Individual business in TX, FL and MD only agencies on the strategic partner list can be appointed. If an agency is submitted that is not on the strategic partner list, an error message will appear. * Sub Agent under General Agency = For West states (CA, CO, NV), Broker/Producer who works under a General Agency * Agency Principal User = Principal/ Authorized Officer for Agency sets up a new agency. This option will only appear if you answered “Yes” to the “Are you the Principal of an Agency or General Agency?” in the “Basic Info” section. When this option is selected, you will need to provide the FEIN for the agency. * Ohio Specific Unicare Message      1. Once completed, click ‘**Continue to Questions**’. |
| 6 | Complete 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**”.  **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.  C:\Users\8445MU\AppData\Local\Temp\1\SNAGHTML39315594.PNG |
| 7 | 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 2. Click the blue hyperlink ‘**sign documents**’     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. |
| 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**’. Only Direct Independent Agents and Agency Principals will be presented with the EFT screen. |
| 9 | The Continue to EFT will appear if you are a new Direct Agent or Agency.    Complete the EFT Info tab to set up how to receive your EFT.  Notes:   * This tab does not appear for sub agent types since their commissions work differently. * Copy/Paste does NOT function in the “Re-enter” fields. * This tab can be skipped and completed later in PTB on the User Profile Account Details.     Click on “**Continue to Fee payment**” |
| 10 | Applicable fees per state will appear. Select payment method and populate necessary information.  C:\Users\8445MU\AppData\Local\Temp\1\SNAGHTML56a774d.PNG |

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| 11 | Click “Submit Payment”: |
| 12 | Appointment and Payment confirmation page will appear: |

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| 13 | You may then check the status of your request on the appointment dashboard. The status is color coded and a detailed description is provided.   |  |  | | --- | --- | | **Color** | **Description** | | Red | Submission processed but includes at least 1 declined state   * If some states were approved and some states were approved it will show red “Completed” | | Amber | Partially complete, some states approved and some states in progress or declined | | Green | Submission processed and completed all states | | Blue | All states in progress | | Grey | Initiated (pending agent action) |     **Note:** Click **Track Status** to see more information about the status and specific information for each state. |

**Broker or Agency Changing an Existing Relationship**

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| **Step** | **Action** |
| 1 | Log in |
| 2 | Click on the profile icon (1) then select “Account Details” (2):  **Note**: this is to make a change to an existing state appointment  C:\Users\8445MU\AppData\Local\Temp\1\SNAGHTML24220abe.PNG |
| 3 | You will be directed to the “Detail” tab, scroll down to the appropriate state and relationship combination you are seeking to update. Click “Edit” to change the relationship setup. You will need to do this step for every Market you wish to change. |
| 4 | Then follow steps 5-13 above. |

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# Appointment Denial Resubmission

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| **Step** | **Action** |
| 1 | If your appointment request was denied in order to become appointed, you will need to resubmit your entire request, proceed as follows:   1. If the appointment is for a new state appointment, proceed to step 1 in the New Broker Appointment section 2. If the appointment is for an existing state appointment, proceed to step 1 in the Broker or Agency Changing an Existing Relationship section (Page 22). |

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| **Step** | **Action** |
| 1 | If you started your appointment process and did not finalize it, you will need to log back into the portal. Please note, depending on where you left off, you may need to start from the beginning.  Click on the profile icon then select “Account Details”:  Graphical user interface, application  Description automatically generated  Select the “Appointments” tab:  Graphical user interface, website  Description automatically generated  Select the desired “In Progress” appointment by clicking on the corresponding “Appointment ID”.  **Please note**: do not select the records flagged as “Appointed”  Graphical user interface, text, application  Description automatically generated  Proceed to resubmit your request. |

# Resuming an Initiated Appointment Request

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| **Step** | **Action** |
| 1 | Log In. |
| 2 | Navigate to ‘**Account Details**’ from drop down. <screenshot> |
| 3 | Select ‘**Appointments**’. |
| 4 | Click on the ‘**Initiate Principal Change’**. |

# Primary user changing the Agency Principal.

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| 5 | Populate the new principal information then click ‘**Initiate Appointment’**. This will generate an email to the new Principal’s email address with additional instructions.    Note: An error message will appear if the new principal is not licensed in the same states as the current agency. The message will disappear within a few seconds & the ‘**Initiate Appointment**’ button will be disabled. The existing primary will need to designate a new primary and start the process. |
| 6 | A success message will appear if a valid principal is selected. |
| 7 | The new principal will receive email with additional instructions.  An **existing** agent will receive the following email:    A **new** agent that needs appointed will receive the following email: |
| 8 | After clicking the link, the agent will be navigated to the Broker Portal. To differentiate the principal change, the ‘**Status**’ will reflect ‘**Principal Change**’ in the Dashboard. |
| 9 | Once the primary initiates the principal change, in the Basic Info section, the Principal question will be disabled.    Agency Information is pre-populated: |
| 10 | In the Appointments tab, new states cannot be added, they can only secure appts for the states the agency is already setup in. Once the principal change takes place, the principal agent can initiate new state appointments. |
| 11 | Forms will need to be re-signed to account for the principal change and then click ‘**Continue to Payment’.** |
| 12 | In the Payment section, the agent may or may need to pay depending on whether the new principal is already appointed with us or not.    If payment is needed and provided, the below success message will display. |
| 13 | After the submission gets processed, the system will be updated with the new principal information. Emails will be sent to the Primary to provide the status of the Principal Change request.  Primary user will receive email confirmation:    Primary user will receive email if the submission is denied:    Note: Once a Primary initiates a principal change it cannot be recalled. |