# New Producers Producer Toolbox Appointment Tool Job Aid

#### Overview

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| Introduction | The purpose of this document is to supply instructions to brokers on how to apply to become a new Anthem broker. Additionally, it shows you how to register for the Broker Portal. The broker onboarding experience has improved by consolidating all onboarding requirements into one single location, the Producer Appointment Tool (PAT), found within the Broker Portal.  **Note:** All prospective brokers will use the Producer Appointment Tool with exception of Ohio Small Group and Large Group brokers, which will continue using No More Forms. |

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| Acronyms Used | | This document uses the following acronyms:   * PTB – Producer Toolbox * PAT – Producer Appointment Tool | |
| Browser Requirements | | This document uses the following acronyms:   * 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 | |
| Instructions | | Follow the steps in the tasks listed below to walk through the Broker Onboarding process found within the PTB Appointment Tool. You can “jump” to a particular task by holding down the “Ctrl” key and selecting the task number. | |
| Table of Contents | |  |  | | --- | --- | | Task # | Task Title | | [1](#_Start_the_Onboarding) | Start the onboarding process | | [2](#_Start_an_Appointment) | Start an Appointment | | |

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Producer Toolbox Appointment Tool, *continued*

**Task 1**: **Start the onboarding process**.

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| Start the Onboarding Process/ Registration | |  |  | | --- | --- | | Step | Action | | 1 | Go to the [PTB log on screen](https://brokerportal.anthem.com/apps/ptb/login). | | 2 | Decide next step.   |  |  | | --- | --- | | **If you are…** |  | | Not yet an Anthem Broker and need to be appointed | Go to Step 3 to begin registering for a Broker Portal Account | | Are an Anthem Broker and need access to the Broker Portal | Go to “[Get Access to PTB](https://www.brainshark.com/anthem/ProducerToolbox_Training)” Broker Job Aid for instructions | | Registered for Broker Portal and have an appointment in progress | Go to the [Resume an Initiated Appointment Request](#resume_appointment) section. | | | 3 | Select the “Register Now” link. The link is for when you are not yet an Anthem broker and want to be appointed.      **Result:** The “Register” page loads. | |

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Producer Toolbox Appointment Tool, *continued*

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| Start the Onboarding Process/ Registration, *continued* | |  |  | | --- | --- | | Step | Action | | 4 | Enter either your Social Security Number or Tax ID, then select **Next**.  Graphical user interface, text, application  Description automatically generated  **Result:** The system checks the broker TIN/SSN against the national ASCS database to find account status. | |

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Producer Toolbox Appointment Tool, *continued*

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| Start the Onboarding Process, *continued* | |  |  | | --- | --- | | Step | Action | | 5 | Complete the Join Our Team form, then select **Create Account**.  **Notes:**   * The new username & password are used in PAT and PTB. * Username 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\8445MU\AppData\Local\Temp\1\SNAGHTML9b70483.PNG  **Result:** A security questions page loads. | |

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Producer Toolbox Appointment Tool, *continued*

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| Start the Onboarding Process, *continued* | |  |  | | --- | --- | | Step | Action | | 6 | Select two distinct security questions and supply a custom response for each, then select **Create Account**.  **Result:** There is a pop-up message to tell you that you are now registered in PAT and have created a log in to go through the appointment process. | | 7 | You can select “Log in Now” to access the PAT process.    **Important Note:** For details about how to log in with or without a password, go to the [Broker Training site](https://www.brainshark.com/anthem/ProducerToolbox_Training) to the job aid called "Log in to PTB Broker Job Aid" under "Producer Toolbox (PTB) Basics". | |

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Producer Toolbox Appointment Tool, *continued*

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| Start the Onboarding Process, *continued* | |  |  | | --- | --- | | Step | Action | | 8 | Once you receive your welcome email, select the **Login Now** button in the email to go to the portal.  **Result:** The log in portal appears. Use your newly created username to log in. | |

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Producer Toolbox Appointment Tool, *continued*

**Follow the steps below to start an appointment for yourself to become an Anthem broker.**

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| Start an Appointment | |  |  | | --- | --- | | Step | Action | | 1 | Log in to PTB/PAT. **Result:** The dashboard shown below displays.  Graphical user interface, application  Description automatically generated | | 2 | Select the **Self-Initiated** tab and select **Start a New Direct Appointment** to start creating an appointment. **Result:** An appointment form appears with tabs across the top. The **Basic Info** tab displays information about the new broker already captured from the National Insurance Producer Registry (NIPR) and cannot be changed. | | 3 | Edit the information shown if needed and answer the required questions at the bottom, then select **Continue**.  **Note:** Required fields have a red asterisk.  Graphical user interface, text, application, email  Description automatically generated | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 4 | Decide the next step based on your answer to the question “Are you the Principal of an Agency or General Agency” from Basic Info tab:   1. If you answered “**Yes**” for question, then go to the next step. 2. If you answered “**No**” for this question, then go to [Step 8](#step8). | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 5 | Update Locations (Mailing, Physical, Residence) and add any Previous Locations if necessary. | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 6 | Add the Agency or General Agency that you represent and select the **Add** button.    **Result:** An Agency Information screen appears. | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 7 | Complete the Agency Information screen then select **Continue to Appointments**.    **Result:**   * Thesystem checks if the Agency is already registered with Anthem. * The brokers can continue only after adding at least one new agency that is not already presently with Anthem. * The broker sees the Appointments screen | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 8 | Select the state/brand combinations you would like to be appointment/contracted in, then select “Line of Business”.  **Notes:**   * Filters are available for State, Brand and Line of Business to use when making selections. * 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. * Select “Remove” to remove the Line of Business (LOB). * Each LOB can be added by selecting **Add another Line of Business**. | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 9 | Select the Agent Type from the Agent Type drop-down list.    **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). * **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. * **Sub Agent under General Agency** = For West states (CA, CO, NV), Broker/Producer who works under a General Agency   Ohio Specific Unicare Message: | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 10 | Select the relationship you would like to designate for on exchange business which may get submitted.  **Note:** Exchange Relationship only applies for Small Group and Individual line of business. | | 11 | Select **W9 Classification**. | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 12 | Complete the Business Survey then select **Continue to Forms**.  C:\Users\8445MU\AppData\Local\Temp\1\SNAGHTML39315594.PNG  **Note:** For some questions where the answer is “Yes” you may be asked to enter more information or upload documentation. | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 13 | All the necessary forms you need to complete appear down the left side of the screen. 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:** There is a single check box that allows you to sign and accept all documents automatically.    **Notes:**   * You have two options to complete the required forms: * You can scroll to the bottom of the forms to the ‘Sign Documents’ section      * Select the blue hyperlink ‘sign documents’ | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 14 | When the forms are completed, you are directed to the next step with a button that says ‘Continue to EFT’ or ‘Continue to Payment’.   Caution: Only new Direct Independent Agents and Agency Principals onboarding for the first time can see the EFT screen. Existing brokers or agencies do not see the EFT screen as part of onboarding process, but they can edit EFT information in the self-service option (see [Existing Producer job aid](https://www.brainshark.com/anthem/ProducerToolbox_Training) for how to edit EFT information). | | 15 | 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. | | 16 | Select **Continue to Fee Payment** button. Applicable fees by state appear. | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 17 | View the amount due on the “Payment” tab.  **Note:** For the appointment, a broker must pay a fee based on the state and Agent Type. There is also a NIPR fee for license validation.  Graphical user interface, text, application  Description automatically generated  **Note:** Hover over the information icon to see the fee breakdown.  Graphical user interface, application  Description automatically generated | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 18 | Scroll down to pay using either a Bank Account or Credit Card (MC or Visa).  **Note:** When you select “Bank Account” you are given options to select between a personal or a business checking or savings account. | |

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Producer Toolbox Appointment Tool, *Continued*

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| Start an Appointment, *continued* | |  |  | | --- | --- | | Step | Action | | 19 | Select the **Submit Payment** button at the bottom of the form.  **Result:** A “Payment Success” screen appears with an assigned appoint number. | | 20 | Select **Back to dashboard**.  **Result:** The first dashboard screen appears with the new appointment displayed with a Status of “In Review”.    **Note:** Anthem uses LexisNexis to perform a background verification. If no issues are found, the appointment is progressed through NIPR and then to ASCS in appointing states. After this is processed and confirmed the Agent can begin producing for Anthem. | |

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Producer Toolbox Appointment Tool, *Continued*

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| Resume an Initiated Appointment Request | |  |  | | --- | --- | | Step | Action | | 1 | Resuming an Initiated Appointment Request:  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.  Select on the profile icon then select “Account Details”: | | 2 | Select the “Appointments” tab: | | 3 | Select the desired “In Progress” appointment by selecting on the corresponding “Appointment ID”.   **Note:** Do not select the records flagged as “Appointed”. | | 4 | Proceed to resubmit your request. | |