

# FMO, EMO, MGA Broker Onboarding Appointment Process

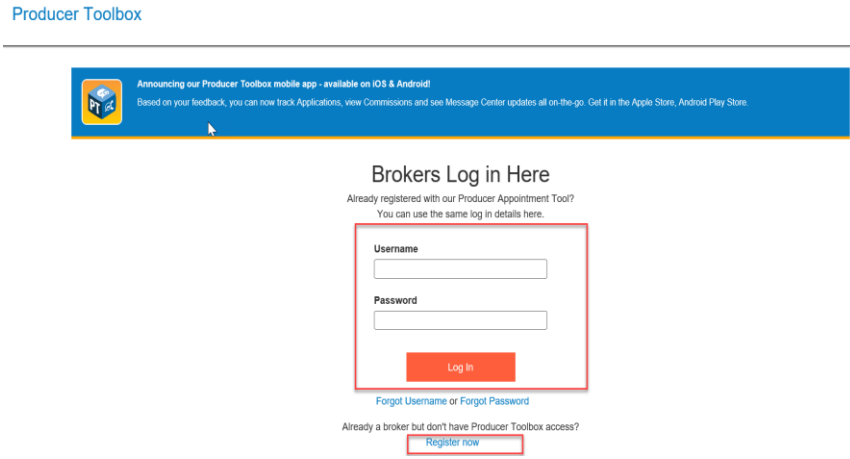
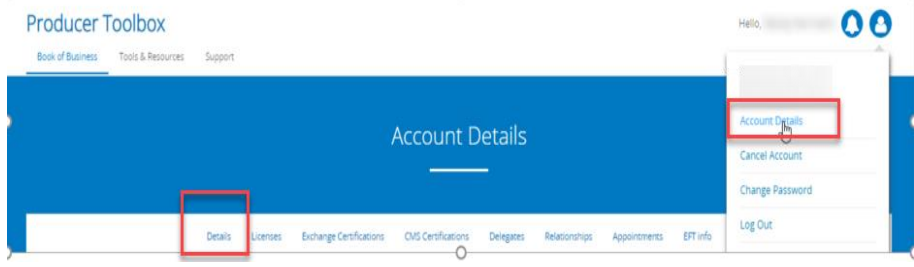
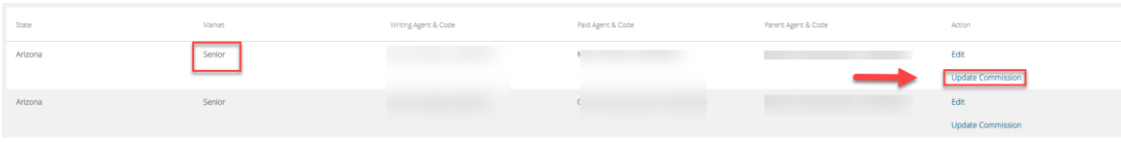
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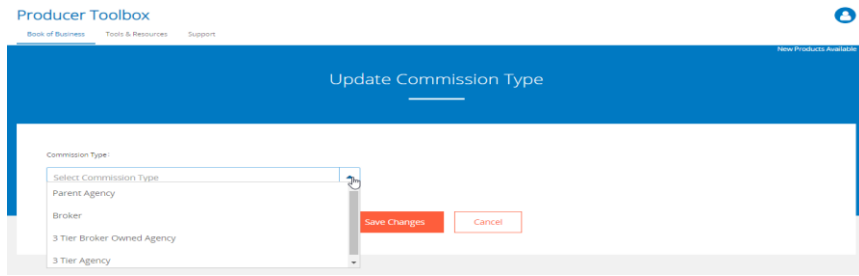
## Purpose

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 specifically how the broker will complete their portion of the appointment request initiated by the FMO, EMO, and MGA agencies.

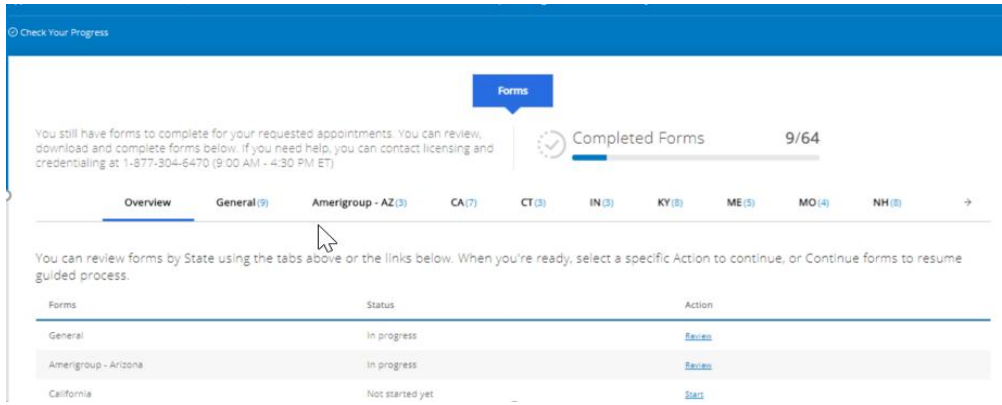
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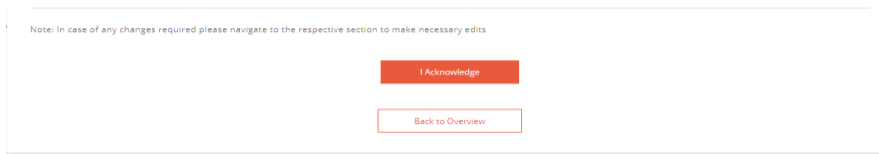
Step	Action
	<p><b>Existing Broker Changing Commission Payment Structure -</b></p> <p>Note: At this time existing agents are only able to request this type of change during the communicated opt in period.</p>
1	<p>Log into Producer Toolbox <a href="https://brokerportal.anthem.com/apps/ptb/login">https://brokerportal.anthem.com/apps/ptb/login</a>            Register if new to Producer Toolbox or log in if existing Producer Toolbox user</p>
	
2	<p>Click the profile icon and <b>'Account Details'</b></p>
	
3	<p>Scroll down to a state with a senior relationship under your upline/parent agency. Click <b>'Update Commission'</b> to change the commission payment setup.</p> <p><b>Note:</b> When changing your commission payment structure, you only have to complete this process for one state. Based on that request, the updates will be made for <b>ALL</b> state under that upline/parent agency.</p>
	
4	<p>Select desired commission payment setup type from the dropdown list. Enter the required agency information if requesting a 3 Tier setup.            Click <b>'Save Changes'</b></p>



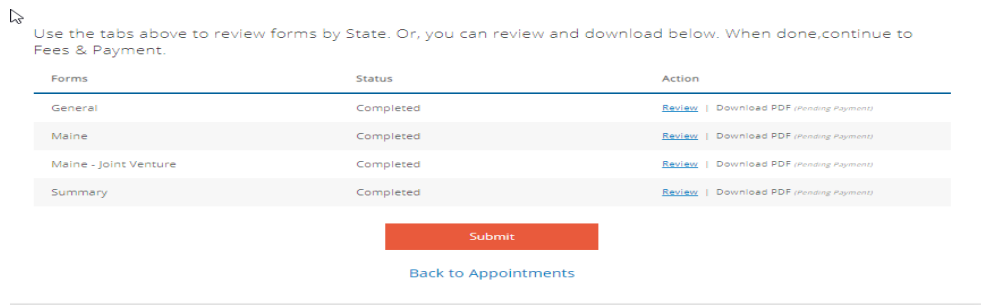
5 Complete all required forms



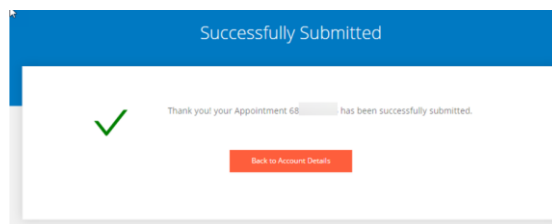
6 Click 'I Acknowledge' and then click 'Back to Overview' once all forms show completed

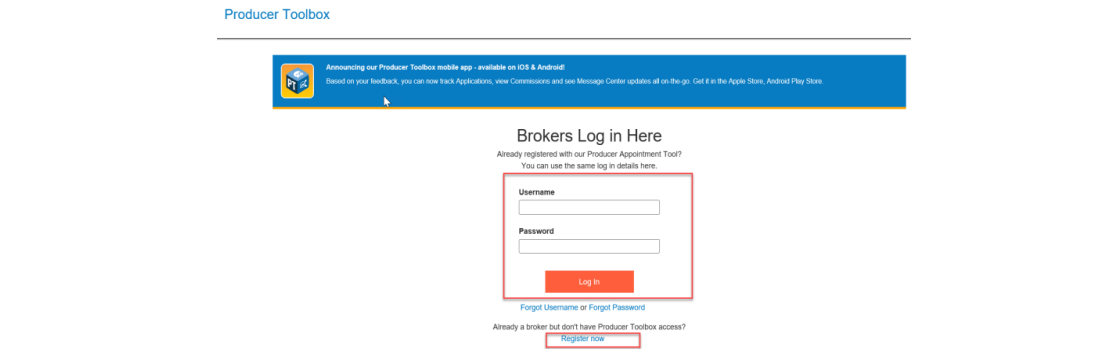
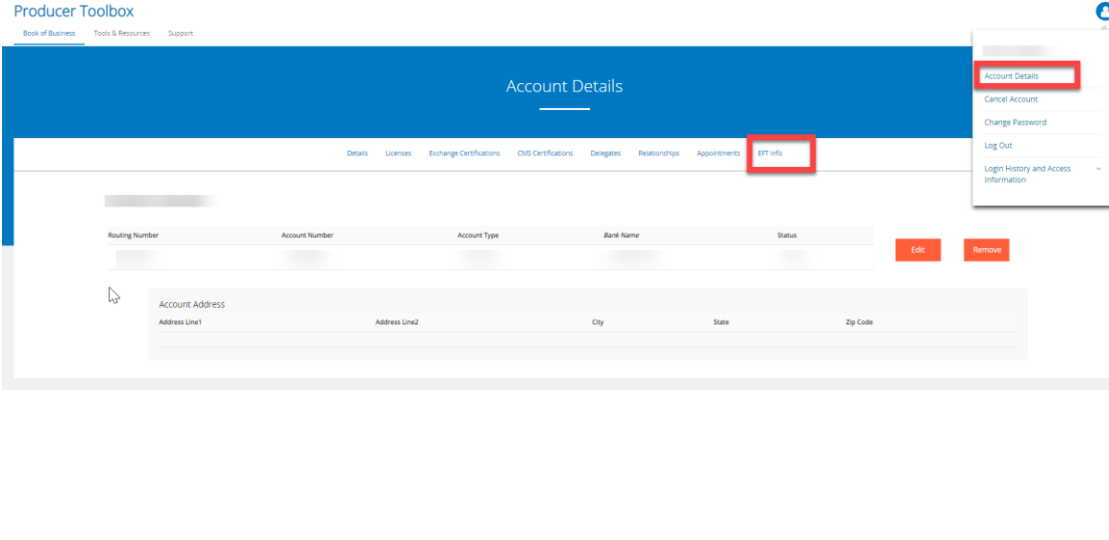


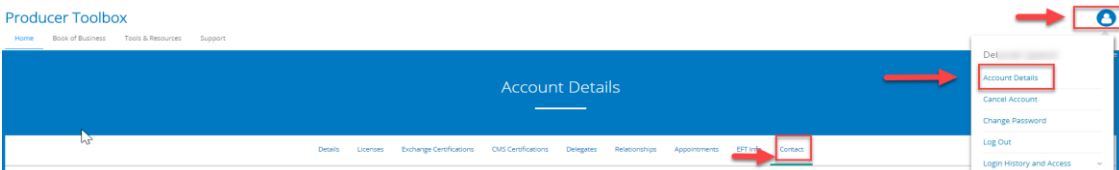
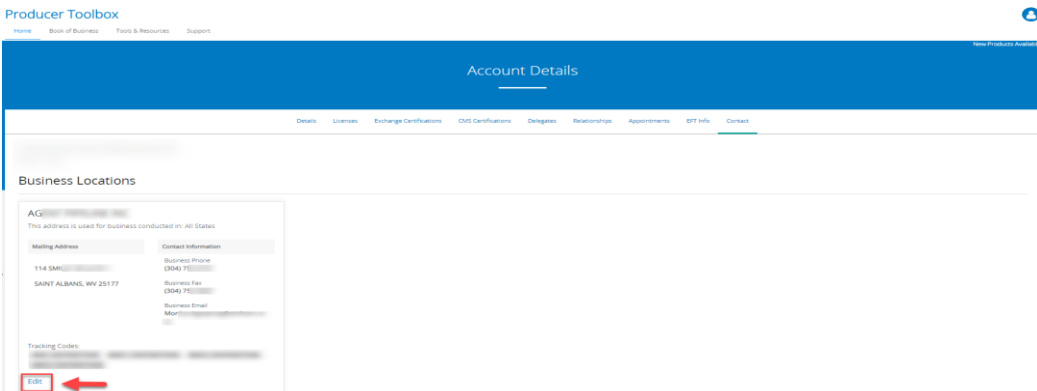
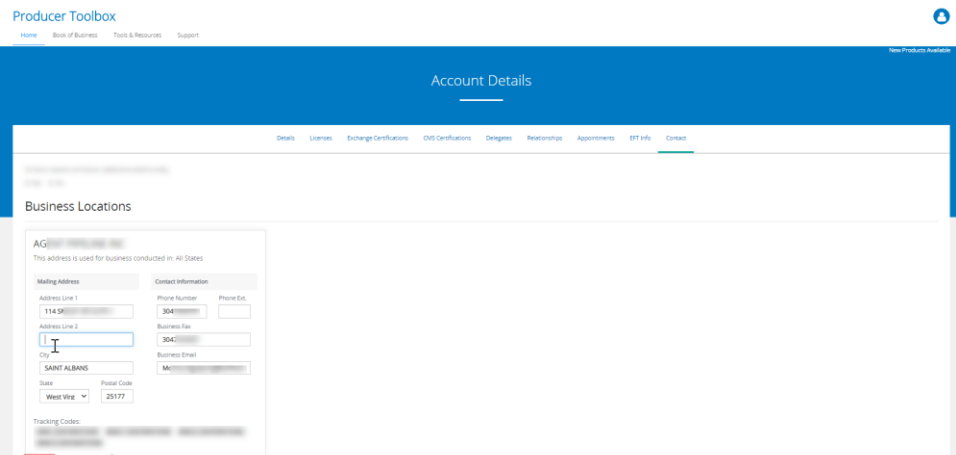
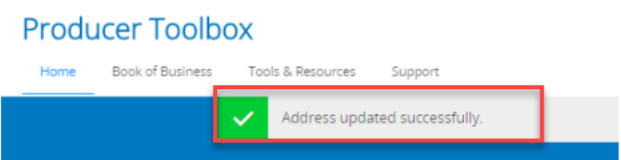
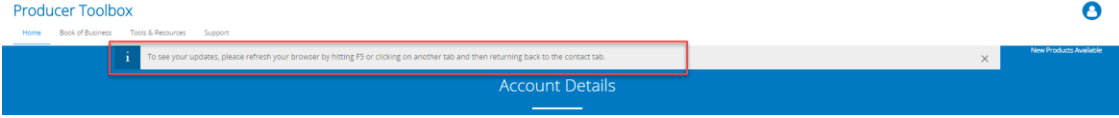
7 Click 'Submit'



8 A confirmation screen will appear with a button to return to 'Account Details'



Step	Action
	<b>Existing Agents Adding or Updating Electronic Fund Transfer (EFT)</b>
1	Log into Producer Toolbox <a href="https://brokerportal.anthem.com/apps/ptb/login">https://brokerportal.anthem.com/apps/ptb/login</a> Register if new to Producer Toolbox or log in if existing Producer Toolbox user
	
2	Click the profile icons, <b>'Account Details'</b> Select <b>'EFT info'</b> - Add, Edit, or Remove EFT information
	

Step	Action
	<b>Updating contact/demographic information</b>
1	<p>Once logged in, click on the profile icon, click <b>'Account Details'</b>, click <b>'Contact'</b></p> 
2	<p>Click <b>'Edit'</b></p> 
3	<p>Update desired information (address, phone number, and/or email address) and click <b>'Save'</b></p> 
4	<p>If updates are accepted, a successfully message will appear.</p> 
5	<p>The message below will then appear. To see your updates, click the <b>'F5'</b> key or click on another tab and then return back to the contact tab.</p> 

## Resources

- Contact Licensing & Credentialing by email at [anthem.brokers@anthem.com](mailto:anthem.brokers@anthem.com) or by phone at 1-877-304-6470 with any questions