

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 or by phone at 1-877-304-6470.
- Tech Support – email to software.support@elevancehealth.com or by phone at 888-268-4361.

Logging In/Creating an Account

Step	Action								
1	<p>Click this direct link: https://brokerportal.anthem.com/apps/ptb/login</p> <p>After you enter the link, if you are already registered, select, “Log in now” as shown below</p> <div data-bbox="436 396 997 543" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Already registered? Log in now ></p> </div>								
2	<p>Register and/or login page appears</p> <table border="1" data-bbox="284 653 1170 942"> <thead> <tr> <th data-bbox="284 653 898 688">If:</th> <th data-bbox="898 653 1170 688">Then:</th> </tr> </thead> <tbody> <tr> <td data-bbox="284 688 898 724">You are a new broker</td> <td data-bbox="898 688 1170 724">Proceed to Step 3</td> </tr> <tr> <td data-bbox="284 724 898 800">You are an existing broker and you do not have a Producer Toolbox account</td> <td data-bbox="898 724 1170 800">Proceed to Step 7</td> </tr> <tr> <td data-bbox="284 800 898 942">You are an existing broker and you have a Producer Toolbox account</td> <td data-bbox="898 800 1170 942">Proceed to New Broker Appointment Section</td> </tr> </tbody> </table>	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
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	<p>New Broker - Click on “Register Now” to get registered.</p> <div data-bbox="207 1018 1344 1612" style="border: 1px solid black; padding: 10px; margin: 10px auto;"> </div>								

Step	Action
4	<p data-bbox="203 136 581 168">Enter your SSN and select Next.</p> <div data-bbox="207 172 1430 930" style="border: 1px solid black; padding: 10px;"> <p data-bbox="688 197 948 231" style="text-align: center; color: #0070C0;">Producer Toolbox</p> <hr data-bbox="224 258 1425 262"/> <p data-bbox="750 369 893 411" style="text-align: center;">Register</p> <div data-bbox="293 422 932 470" style="border: 1px solid red; padding: 2px;"> <p data-bbox="318 441 1325 489" style="font-size: small;">If you are not already appointed with Anthem please begin with your SSN. If you are appointed, and need to register to use Producer Toolbox, enter your Agency Tax ID to register an Agency, or your SSN to register as an independent agent.</p> </div> <div data-bbox="615 556 716 577" style="text-align: center; font-size: small;">Tax ID / SSN</div> <div data-bbox="618 590 997 621" style="border: 1px solid #ccc; padding: 2px; text-align: center; font-size: small;">TAX ID / SSN</div> <div data-bbox="766 669 876 718" style="text-align: center; margin: 10px 0;"> <div style="background-color: #E67E22; color: white; padding: 5px 15px; display: inline-block;">Next</div> </div> <div data-bbox="688 762 954 850" style="text-align: center; font-size: small;"> <p>Cancel Registration ></p> <p>Already registered? Log in now ></p> <p>Contact Us Terms & Conditions</p> </div> </div>
5	<p data-bbox="203 1008 747 1039">Populate all fields and click “Create Account”:</p> <p data-bbox="203 1077 354 1104">Please note:</p> <ul data-bbox="253 1115 1401 1215" style="list-style-type: none"> 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). <p data-bbox="203 1260 410 1287">User Name rules:</p> <ul data-bbox="253 1297 1406 1398" style="list-style-type: none"> 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. <p data-bbox="203 1442 391 1470">Password rules:</p> <ul data-bbox="253 1509 1380 1537" style="list-style-type: none"> Your Password must be more than 8 letters or numbers and should be limited to length 20.

Step	Action
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Producer Toolbox

Join Our Team

It's easy to become a broker. Register here to start the appointment process.
The username and password you create will also be used to log in to Producer Toolbox.

First Name Last Name

Primary Email

Primary Phone Number

Tax ID Primary Business Zip Code

Create Username

Create Password Confirm Password

[Create Account](#)

[Already appointed?](#) [Log in now >](#)

6 Successful prompt will appear, click "Log in Now":

Producer Toolbox

Primary Phone Number

✕

Congratulations, you're now registered! We sent a confirmation email to the address you provided.

➔
Log in now
Cancel

○ Required field.

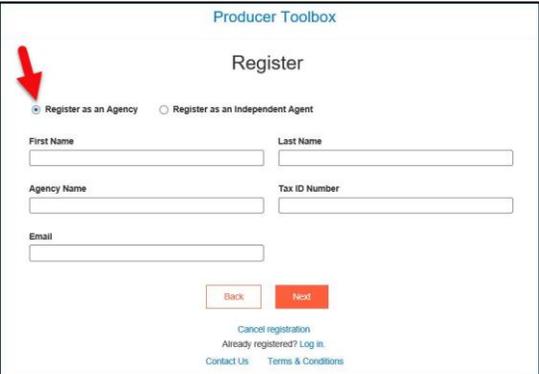
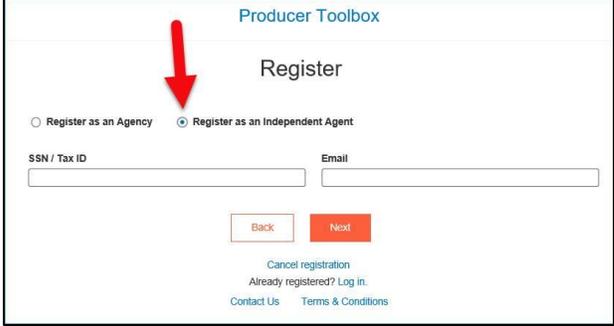
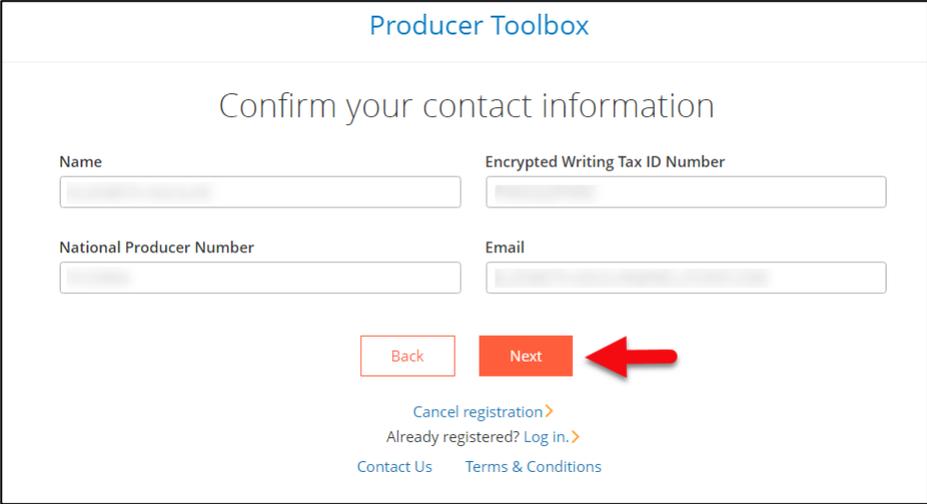
Proceed to Step 17.

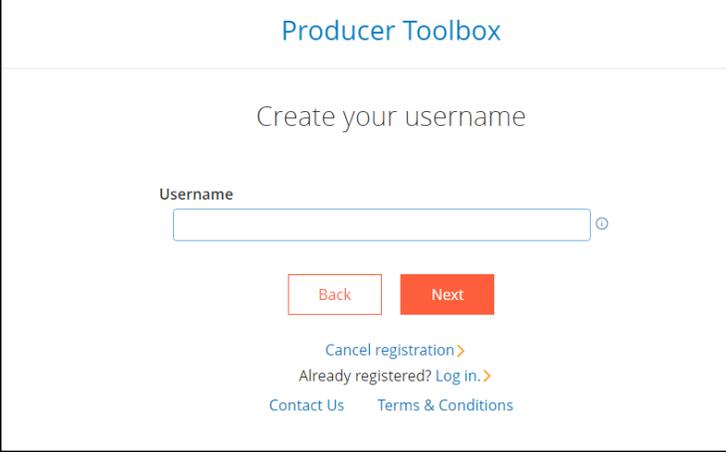
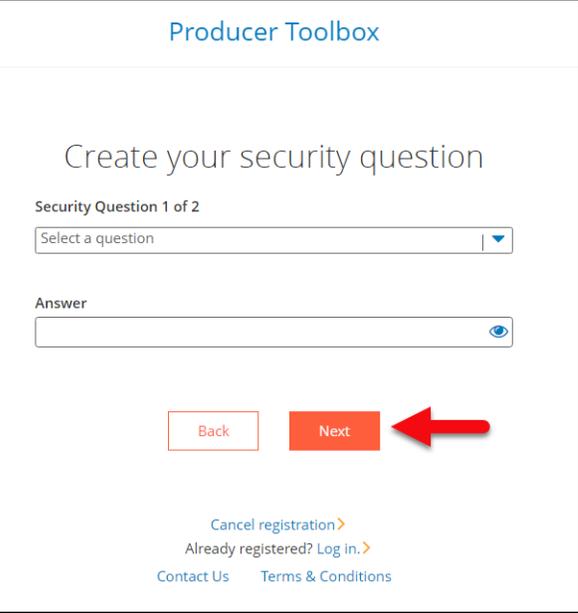
Step **Action**

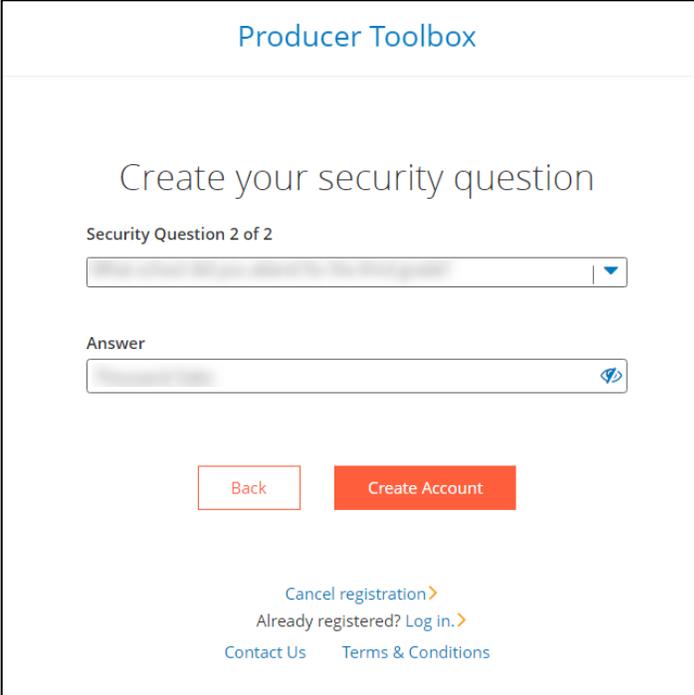
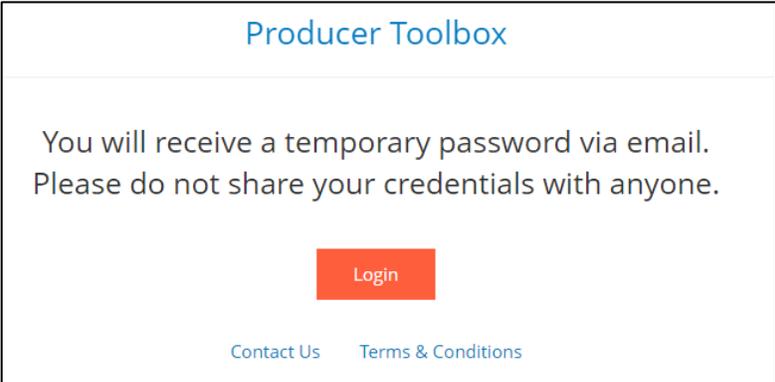
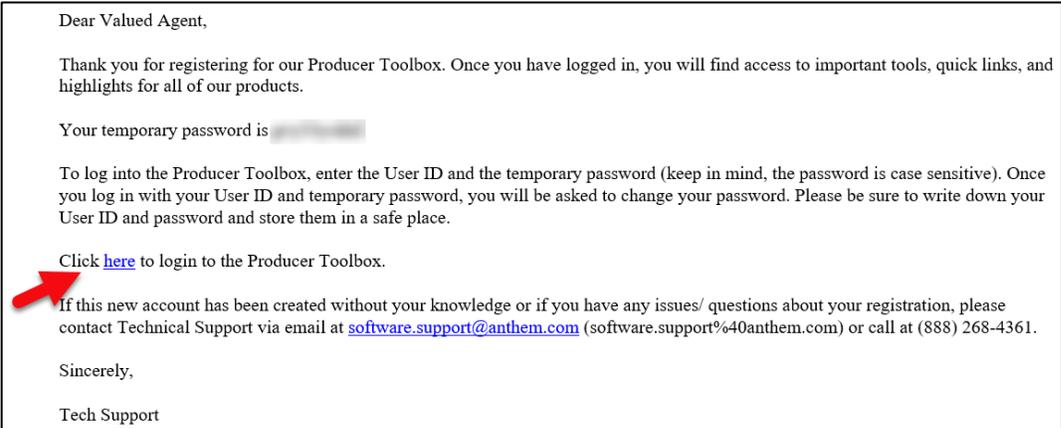
7 If you have an active contract, but have not registered, click on "Register Now"

8 Enter your SSN and select Next.

Step	Action
9	<p>Click on "Next":</p> <div data-bbox="207 205 1344 894" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">Producer Toolbox</p> <hr/> <p style="text-align: center;">Broker Registration Agreement</p> <p>To gain access to the Producer Toolbox, you will need to register. To register, start the sign-up process by agreeing to the Broker Registration Agreement. You will need to provide some initial information so that we can identify you, and then confirm your registration by providing a User Name and Password. Upon successful completion, we will send you a confirmation email.</p> <p style="text-align: center;"> <input type="button" value="Next"/>  </p> <p style="text-align: center;"> Already registered? Log in. > </p> <p style="text-align: center;"> Contact Us Terms & Conditions </p> </div>
10	<p>Click on "I Agree":</p> <div data-bbox="207 1003 1284 1755" style="border: 1px solid black; padding: 10px;"> <p>User Agreement</p> <p>In consideration of the assignment to me of login credentials for access to the Producer Toolbox Website, I agree to the following terms of usage:</p> <ul style="list-style-type: none"> • I agree to keep my login credentials (User Name and Password) private. I will not share my login credentials with anyone personal or business related, nor will I assist anyone in gaining unauthorized access to the Producer Toolbox Website. • I will not attempt to log in to the Producer Toolbox Website using any other login credentials other than my own. • I will use information from the Producer Toolbox Website strictly in accordance with the law and only for conducting business in accordance with the terms of my agent or broker agreement and for no other purpose whatsoever. Without limiting the generality of the foregoing, and in accordance with the Business Associate Agreement I have entered into, I specifically agree to take all necessary precautions to safeguard the privacy and security of any Personal Health Information to which I may have access through use of the Producer Toolbox Website. • I will not attempt to access any area or data within this system for which I have not been granted access. • I agree that I am solely responsible for the accuracy of any information I provide via <p style="text-align: center;"> <input type="button" value="I Do Not Agree"/> <input type="button" value="I Agree"/>  </p> </div>

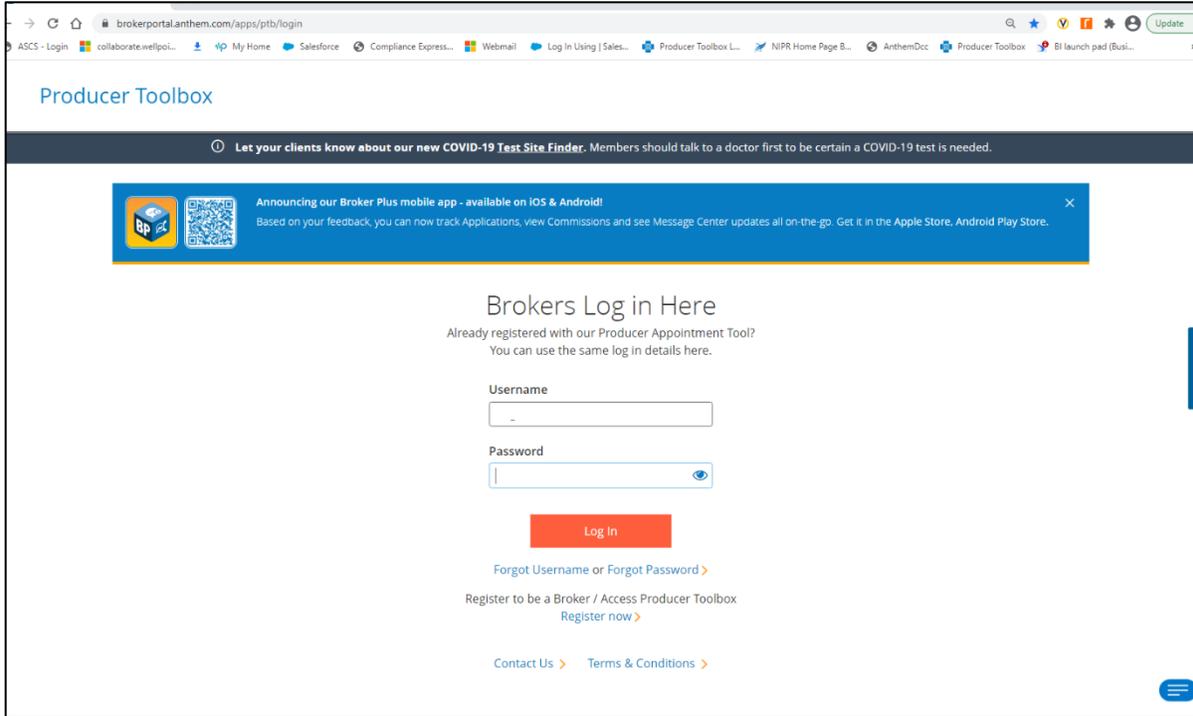
Step	Action	
11	<p>If an agency wants to register, select the radial button “Register as an Agency”</p> <p>Populate fields as follows:</p> <ul style="list-style-type: none"> • First Name = Principal’s First Name • Last Name = Principal’s Last Name • Agency Name = Agency Name • Tax ID Number = Agency’s TIN • Email = Email address on file in our licensing system for the agency <p>Click “Next” and proceed. After the agency is registered they can assign delegates</p> 	<p>If a direct agent, subagent or principal of an agency wants to register, select the radial button “Register as an Independent Agent”</p> <p>Populate fields as follows:</p> <ul style="list-style-type: none"> • SSN/Tax ID = direct agent or subagent’s TIN • Email = Email address on file in our licensing system for the direct agent or subagent <p>Click “Next” and proceed.</p> 
12	<p>Confirm your information is correct:</p> <ul style="list-style-type: none"> • 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 	

Step	Action
13	<p>Create your username, then click “Next”</p> <p>User Name rules:</p> <ul style="list-style-type: none"> • 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. <p>Password rules:</p> <ul style="list-style-type: none"> • Your Password must be more than 8 letters or numbers and should be limited to length 20. 
14	<p>Select and answer the 1st security question then click “Next”</p> 

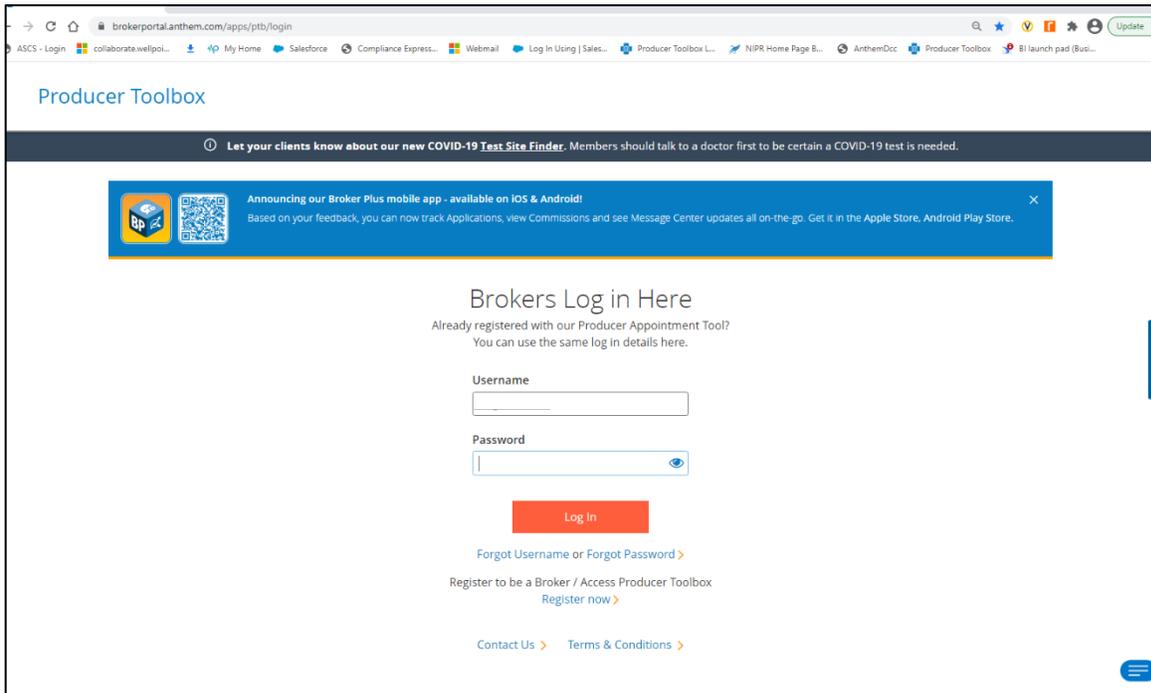
Step	Action
15	<p>Select and answer the 2nd security question and click “Create Account”:</p> 
16	<p>Following message will appear:</p> 
17	<p>Once you receive your email with your temporary password, click on the link “here”. You will be directed to the portal.</p> 

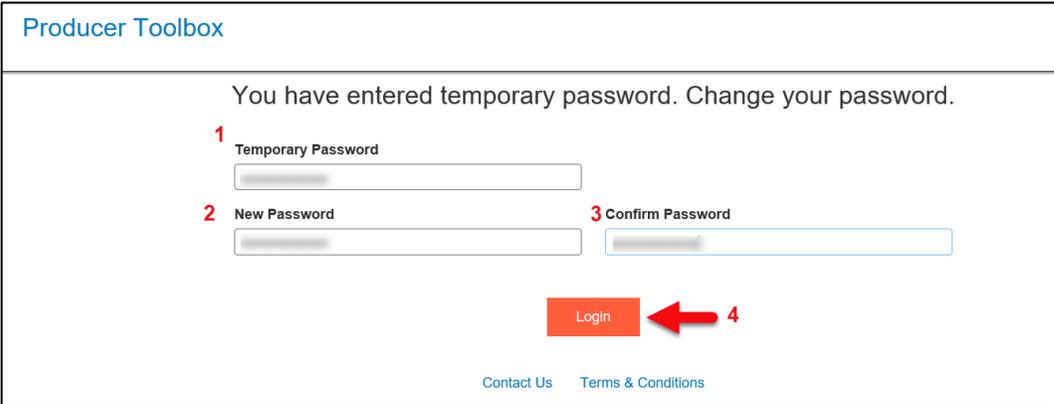
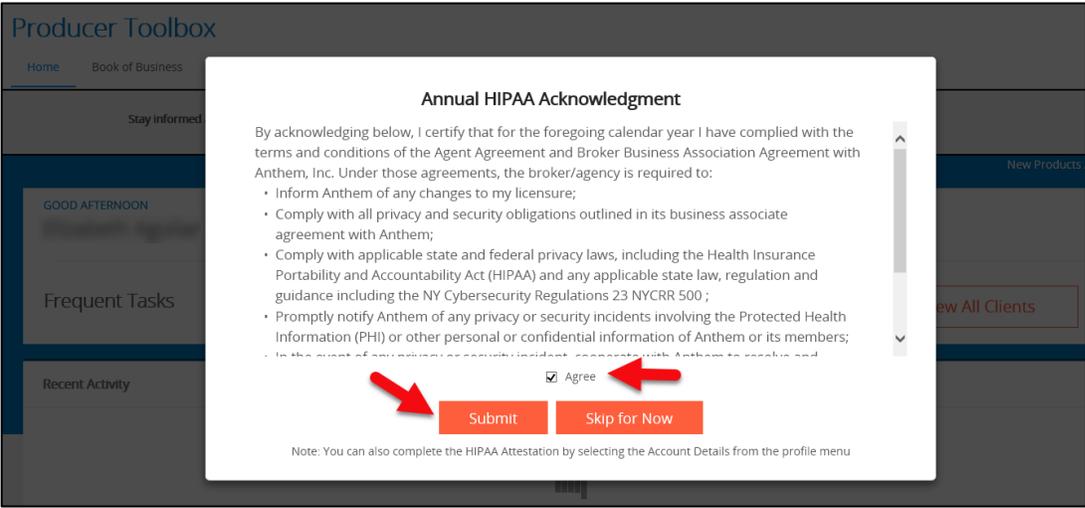
Step **Action**

18 Portal log in will appear:

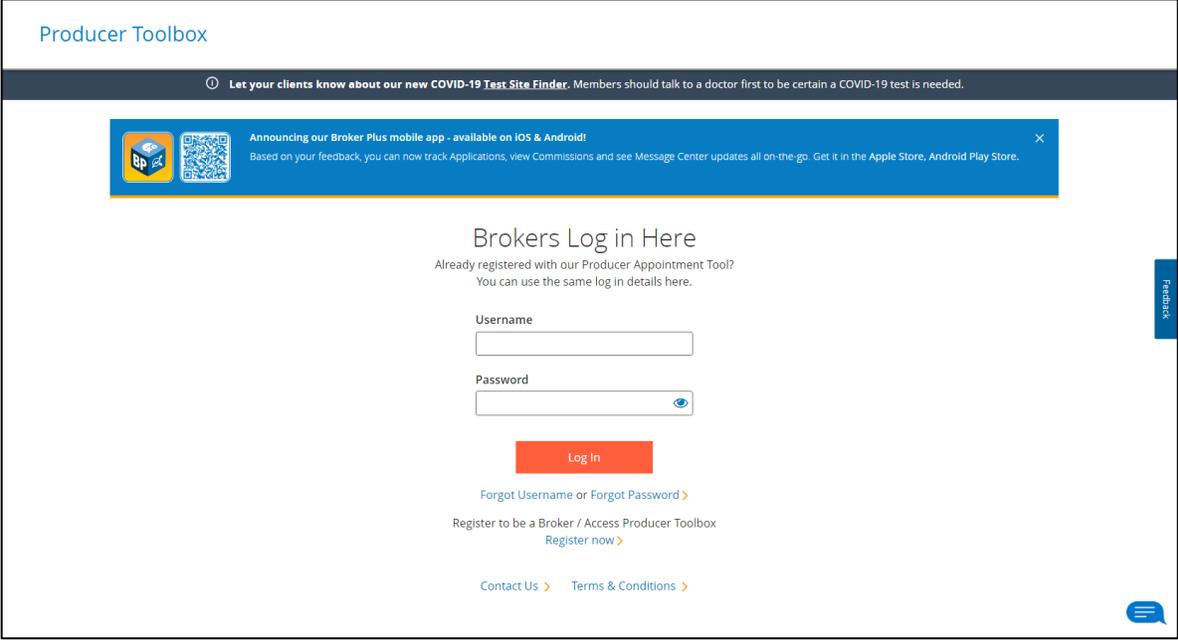
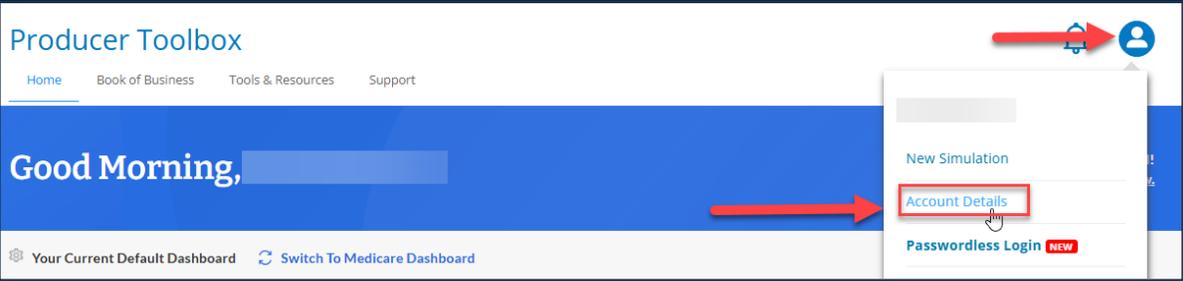
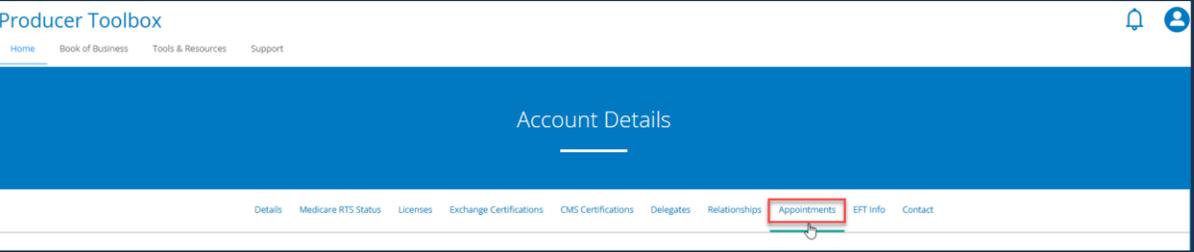


19 Enter your "Username" and the temporary password you were issued and click "Log In":

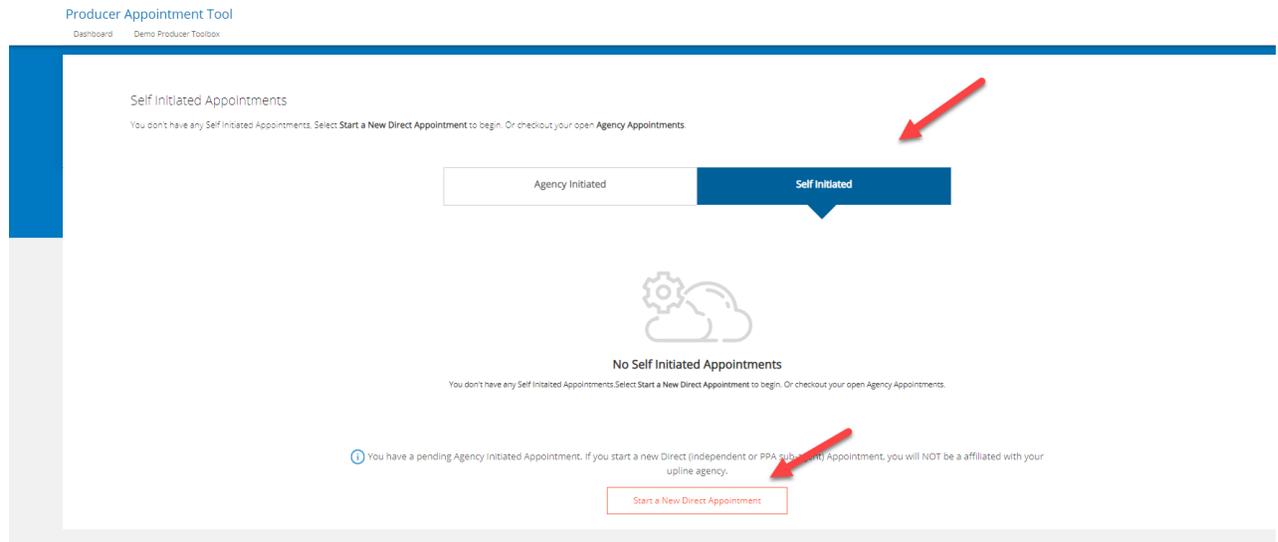


Step	Action
20	<p>Enter:</p> <ol style="list-style-type: none"> 1. Temporary password – supplied on the email you received 2. Create a new password 3. Confirm your new password 4. Click “Login” 
21	<p>Ensure the “agree” checkbox is flagged and click “Submit”</p> 
22	<p>You may get started on submitting new appointment requests.</p>

New Broker Appointment

Step	Action
1	<p>Log in</p> <ol style="list-style-type: none">1. enter your username2. enter password3. click login <p>Note: Do not use your agency information to log in</p> 
2	<p>Click on the profile icon then select "Account Details":</p>  <p>Click on Appointments tab to begin a new appointment.</p> 

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"

The screenshot shows the 'Producer Appointment Tool' form. The 'Basic Info' section is active. The form contains the following fields and questions:

- Personal Information** (Completed):
 - First Name (LD)
 - Last Name (HA02)
 - Former Name or Alias (LEN)
 - Date of Birth (MM/DD/YYYY) (04/0)
 - Phone Number (S131)
 - Email Address (E)
 - NPN (National Producer Number) (13)
 - What is your Resident License State? (Maine)
- Do you speak more than one language?
 - Yes No
- I agree to access my commission statements electronically.
 - Yes No
- Are you the Principal of an Agency or General Agency?
 - Yes No

Buttons: 'Back to Appointments Dashboard' and 'Continue'.

Below the form, there are sections for 'Locations' (Completed) and 'Agency Information' (Not Started). A red box highlights the text: 'Agency Information will only appear if you select 'yes' to question 3. This is only required if you are trying to setup your agency'.

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”**

The screenshot shows the 'Producer Toolbox' dashboard with a navigation menu at the top containing 'Basic Info', 'Appointments', 'Business Survey', 'Forms', and 'Payment'. The 'Basic Info' section is active and contains the following elements:

- Personal Information:** A section with a 'Completed' status.
- Locations:** A section with an 'In Progress' status.
- Home Locations:**
 - Current Residence:** Includes a radio button to 'Make this my preferred address'. Fields include Address Line 1 (123 Mickey Mouse Lane), Address Line 2, City (Indianapolis), State (Indiana), and Zip Code (46204).
 - [Add another residence address](#)
- Business Locations:**
 - Mailing Address:** Includes a radio button to 'Make this my preferred address' and a note: 'If PO Box, please provide physical address below.' Fields include Building Name (if applicable), Address Line 1 (321 Donald Duck Road), Address Line 2, City (Indianapolis), State (Indiana), and Zip Code (46204).
 - [Add another business address](#)
- Physical Address:** Includes a radio button to 'Make this my preferred address' and a checked option 'Same as Preferred Address'. Fields include Building Name (if applicable), Address Line 1 (321 Donald Duck Road), Address Line 2, City (Indianapolis), State (Indiana), and Zip Code (46204).
- [Add another business address](#)

- Previous Locations:**
- Question: 'Do you have any previous address(es) you would like to provide?' with radio buttons for 'Yes' and 'No' (selected).
- Buttons:** A red 'Continue to Appointments' button with a red arrow pointing to it, and a blue 'Edit Personal Information' link below it.

- 5
1. Select the state/brand combinations you would like to be appointment/contracted in.
 - a. 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.
 - a. 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.

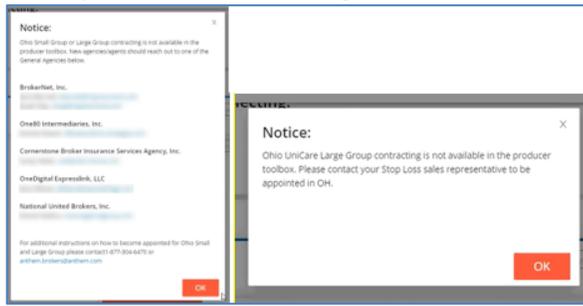
Drop down definitions:

 - 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, MD and WA 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.

The screenshot shows the 'Producer Appointment Tool' interface. At the top, there are navigation tabs: 'Basic Info', 'Appointments' (selected), 'Business Survey', 'Forms', 'EFT Info', and 'Payment'. Below the tabs, a message reads: 'Let us know what state(s) you want to be appointed in. Only the states you're licensed in will show below. Lines of Business (LOB) you already sell are grayed out.' Below this, there are filter buttons for 'States', 'Brands', 'Line Of Business', and 'Reset Filters'. The main content is a table with the following columns: States, Brand, Line Of Business, Agent Type, and Exchange Relationship. The table lists various states and brands, with some rows highlighted in blue. For example, the row for Colorado with Anthem brand and Individual Line of Business is highlighted, and the 'Direct Independent Agent' option is selected. There is also a '+ Add another Line of Business' link below the highlighted row.

States	Brand	Line Of Business	Agent Type	Exchange Relationship
<input type="checkbox"/> Alaska	Wellpoint	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> Alabama	Wellpoint	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> Arkansas	Wellpoint	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> Arizona	Wellpoint	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> Arizona	Wellpoint (For Senior Business)	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> California	Wellpoint	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> California	Anthem	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> Colorado	Wellpoint	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input checked="" type="checkbox"/> Colorado	Anthem	Individual + Add another Line of Business	Direct Independent Agent	<input checked="" type="checkbox"/>
<input type="checkbox"/> District Of Columbia	Wellpoint	Select a Line of business	Select an Agent Type Direct Independent Agent	<input type="checkbox"/>
<input type="checkbox"/> Ohio	Wellpoint	Select a Line of business	Select an Agent Type	<input type="checkbox"/>
<input checked="" type="checkbox"/> Ohio	Anthem	Individual + Add another Line of Business	Direct Independent Agent	<input checked="" type="checkbox"/>

➤ Ohio Specific Unicare Message

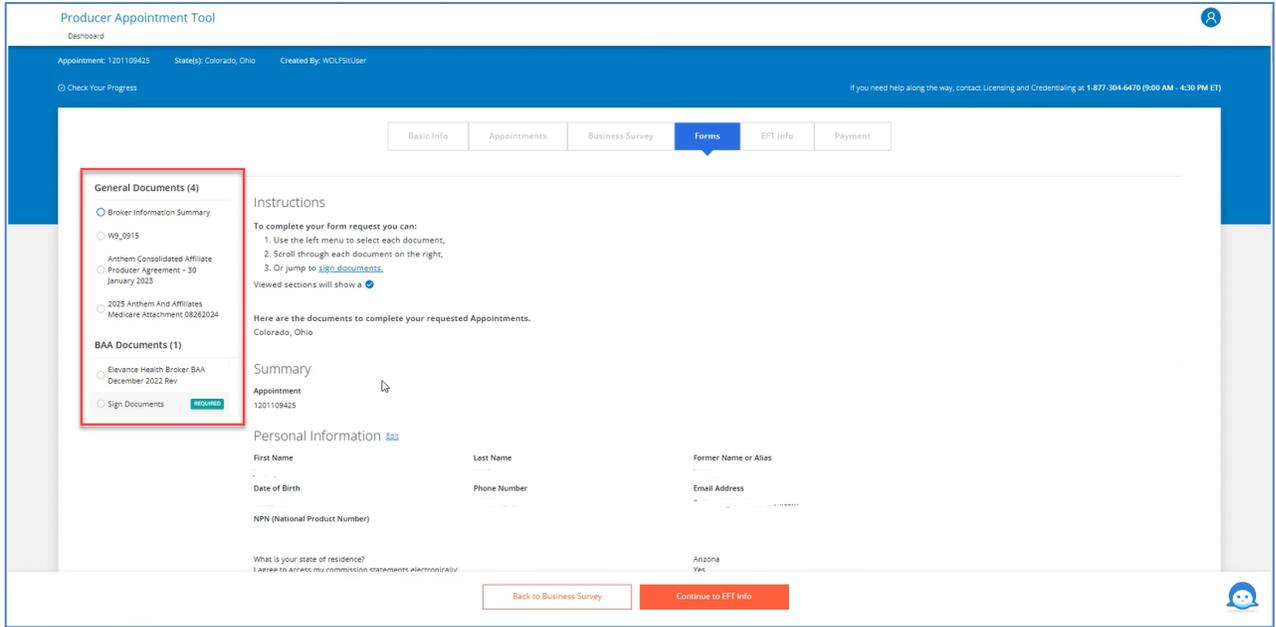


4. Once completed, click 'Continue to Questions'.

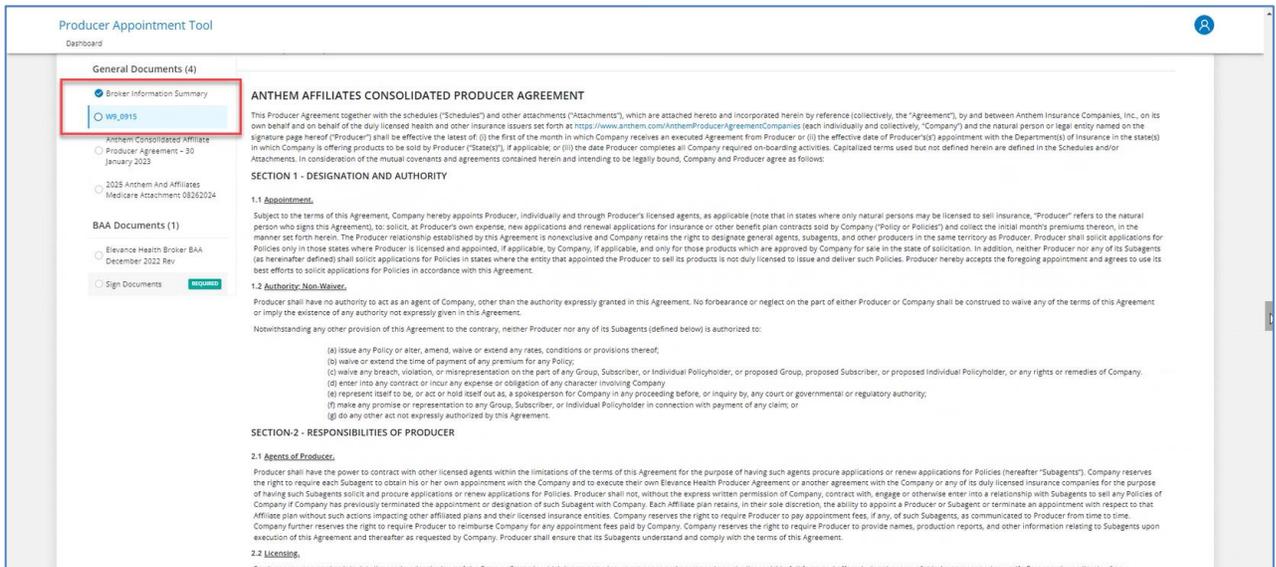
6 Complete the questions in the Business Survey section. Provide any additional information and select "Upload Documents" to attach any relevant documentation. Once completed, click "Continue to Form".

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.

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'

Producer Appointment Tool
Dashboard
Appointment: 1201109425 State(s): Colorado, Ohio Created By: WOLFSUSER

Check Your Progress If you need help along the way, contact Licensing and Credentialing at 1-877-304-6470 (9:00 AM - 4:30 PM ET)

Basic Info Appointments Business Survey **Forms** EFT Info Payment

General Documents (4)

- Broker Information Summary
- W9_0915
- Anthem Consolidated Affiliate Producer Agreement - 30 January 2023
- 2025 Anthem And Affiliates Medicare Attachment 08262024

BAA Documents (1)

- Elevance Health Broker BAA December 2022 Rev
- Sign Documents **REQUIRED**

Instructions

To complete your form request you can:

1. Use the left menu to select each document.
2. Scroll through each document on the right.
3. Or jump to sign documents.

Viewed sections will show a

Here are the documents to complete your requested Appointments.
Colorado, Ohio

Summary

Appointment
1201109425

Personal Information

First Name Last Name Former Name or Alias
Date of Birth Phone Number Email Address
NPN (National Product Number) Arizona Yes

What is your state of residence?
I agree to access my commission statements electronically.

Back to Business Survey Continue to EFT Info

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.

Producer Appointment Tool
Dashboard

General Documents (4)

- Broker Information Summary
- W9_0915
- Anthem Consolidated Affiliate Producer Agreement - 30 January 2023
- 2025 Anthem And Affiliates Medicare Attachment 08262024

BAA Documents (1)

- Elevance Health Broker BAA December 2022 Rev
- Sign Documents **REQUIRED**

Sign Documents

Date
02/17/2025

Elevance Health, Inc. on behalf of its affiliates*

Name of Company
Felicia Norwood
EVP & President, Government Programs

C. Morgan Kendrick
EVP & President, Commercial & Specialty Business
Broker BA Agreement (Template revised December 2022) Form No: BR001 BK001

Sign Documents

I agree, and it is my intent, with full knowledge and consent to sign these documents by (i) accessing the Elevance Health Broker Portal using a secure password that I created; (ii) electronically checking the box below; and (iii) submitting these documents through the Elevance Health Broker Portal to Elevance Health. I understand that by signing and submitting these documents in this fashion, I am (i) consenting to performing business electronically with Elevance Health; (ii) agreeing that my actions are the legal equivalent of having placed my handwritten signature on the submitted documents and this affirmation; and (iii) agreeing to be legally bound by the terms and conditions of the documents. I will not raise any defenses or invoke regulatory or statutory claims attempting to invalidate the enforceability of the documents to which the electronic signature is fixed.

First Name Last Name
Today's Date
2/17/2025

I have read and accept all documentation presented.

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.

11 Click “Submit Payment”:

Producer Toolbox
Dashboard

Visa Card
 Chuber Test
 *****4113
 Expiration Date: / 30188

Account Address
 Same as Mailing Address
 Building Name (if applicable)

 321 Donald Duck Road

 Indianapolis Indiana
 46204

12 Appointment and Payment confirmation page will appear:

Producer Toolbox
Dashboard

Appointment: 9291231114 State(s): Arizona, California Create PDF Forms PDFs is being generated for submitted forms.

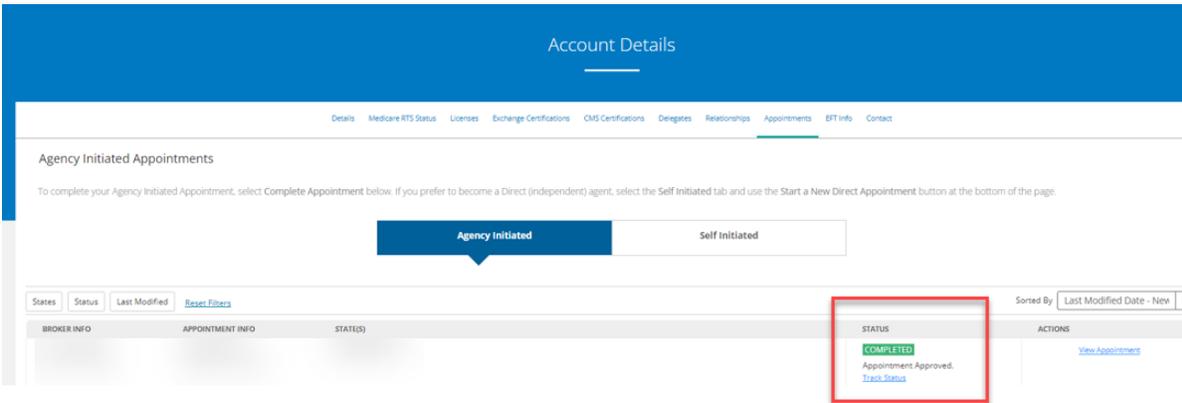
Check Your Progress

Payment Success

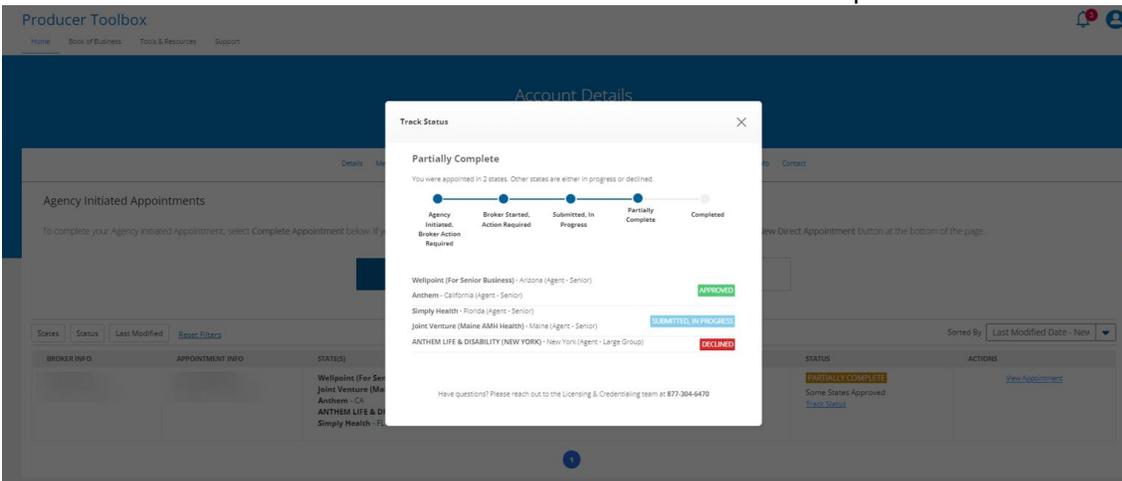
Thank you! Your payment for Appointment 9291231114 has been successfully submitted. Please check your email for transaction details.

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 <ul style="list-style-type: none"> 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)

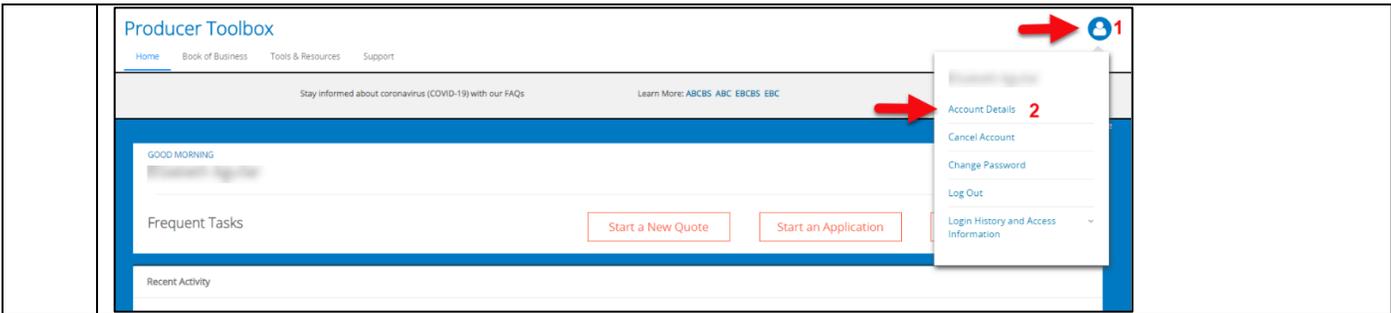


Note: Click **Track Status** to see more information about the status and specific information for each state.

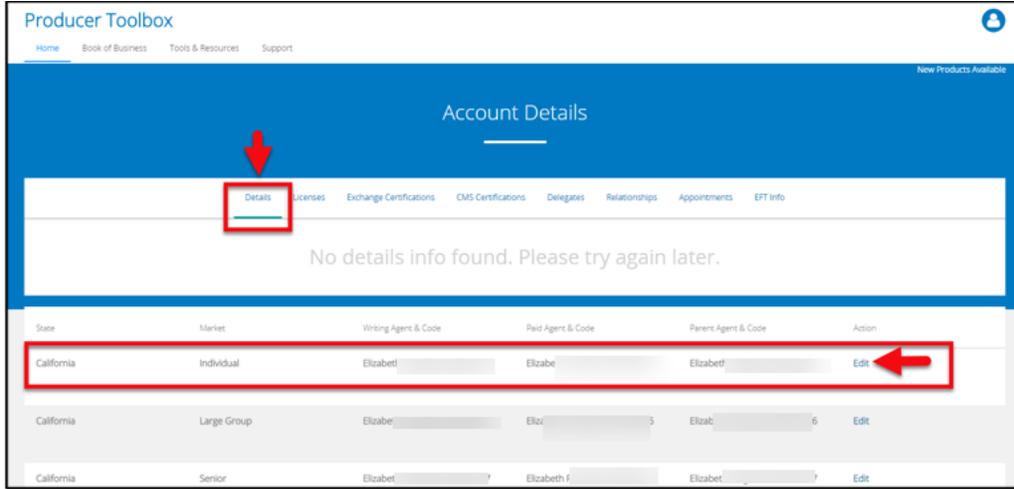


Broker or Agency Changing an Existing Relationship

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



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.

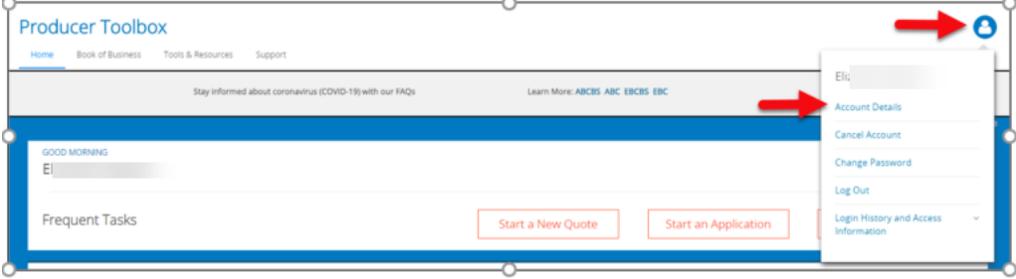
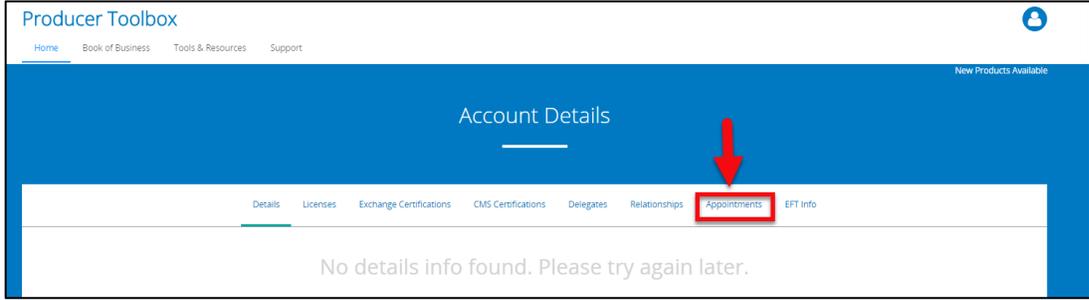
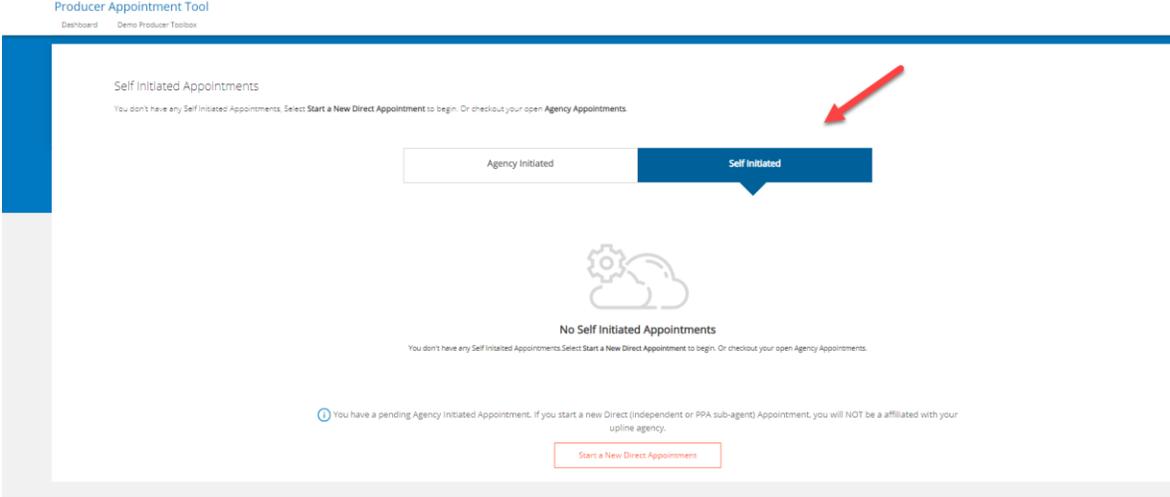


4 Then follow steps 5-13 above.

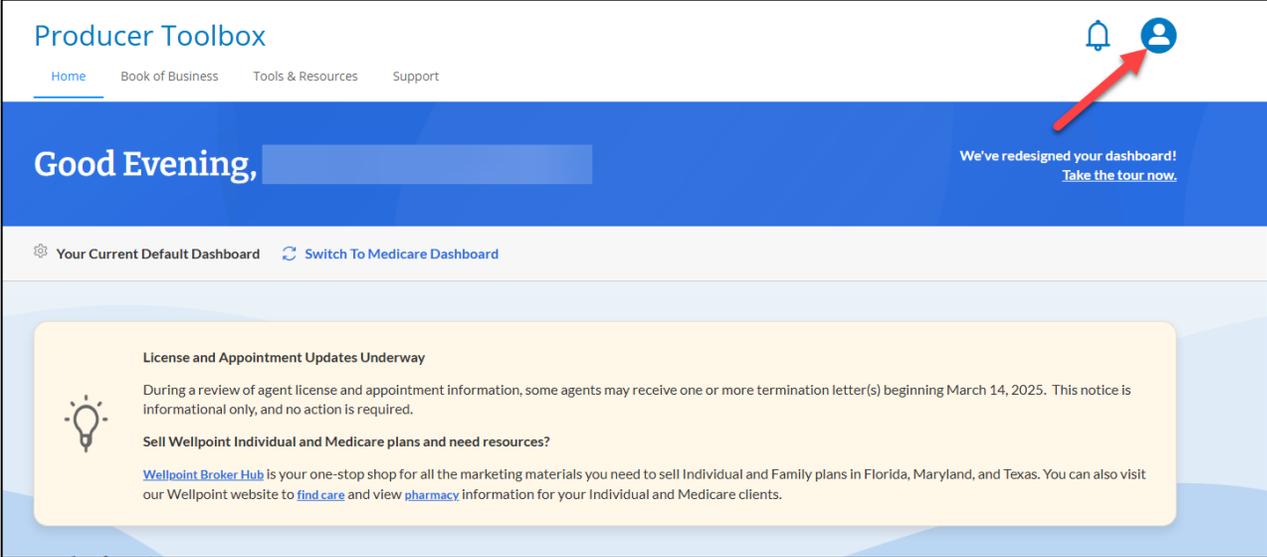
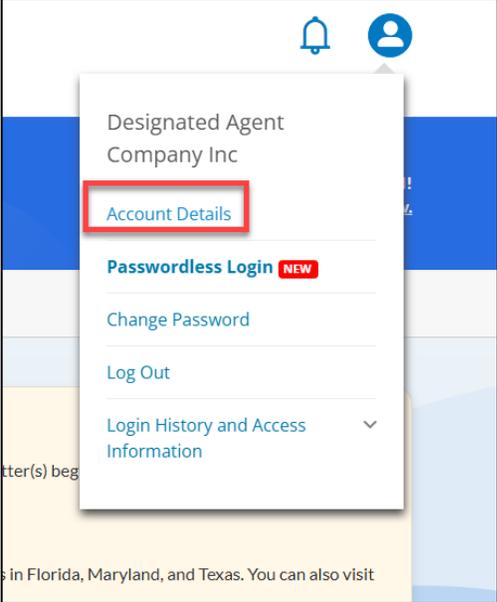
Appointment Denial Resubmission

Step	Action
1	<p>If your appointment request was denied in order to become appointed, you will need to resubmit your entire request, proceed as follows:</p> <ol style="list-style-type: none"> 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).

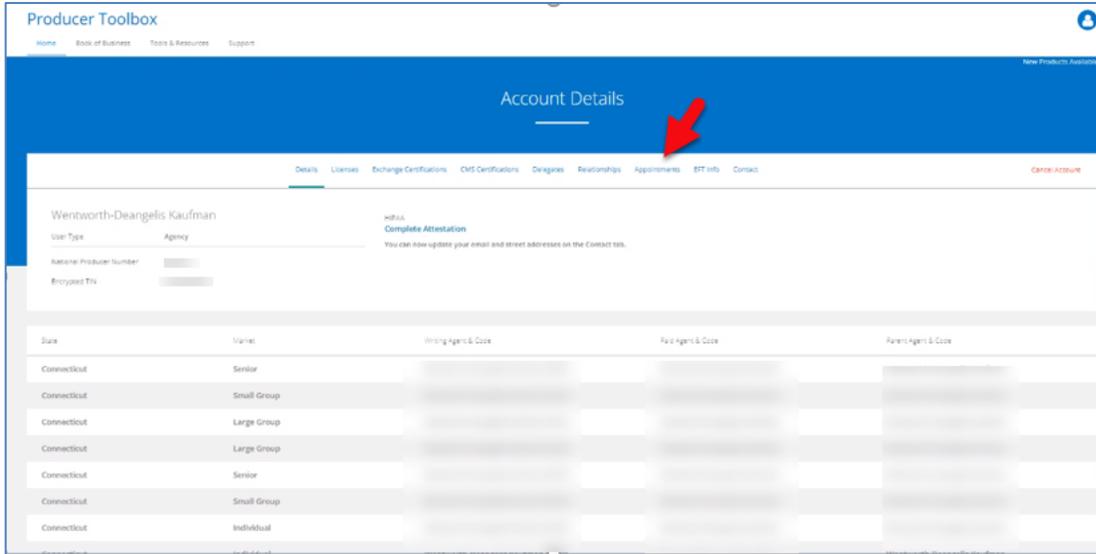
Resuming an Initiated Appointment Request

Step	Action
1	<p>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.</p> <p>Click on the profile icon then select “Account Details”:</p>  <p>Select the “Appointments” tab:</p>  <p>Select the desired “In Progress” appointment by clicking on the corresponding “Appointment ID”. Please note: do not select the records flagged as “Appointed”</p>  <p>Proceed to resubmit your request.</p>

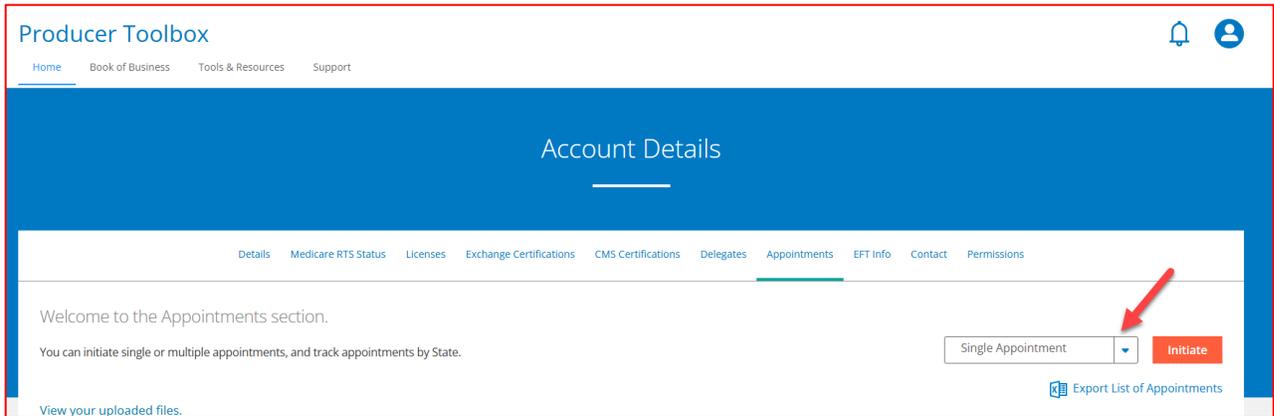
Primary user changing the Agency Principal.

Step	Action
1	Log In.
2	Click Person Icon.  <p>The screenshot shows the 'Producer Toolbox' dashboard. At the top right, there is a notification bell icon and a user profile icon. A red arrow points to the user profile icon. Below the navigation bar, there is a blue banner with the text 'Good Evening,' followed by a blurred name. To the right of the banner, it says 'We've redesigned your dashboard! Take the tour now.' Below the banner, there are two buttons: 'Your Current Default Dashboard' and 'Switch To Medicare Dashboard'. A large yellow notification box is present, containing text about license updates and Wellpoint resources.</p>
	Select Account Details.  <p>The screenshot shows a user profile dropdown menu. The menu is open, displaying the following options: 'Designated Agent Company Inc', 'Account Details' (highlighted with a red box), 'Passwordless Login NEW', 'Change Password', 'Log Out', and 'Login History and Access Information'. The background shows the same dashboard as the previous screenshot, but with the notification box partially obscured.</p>

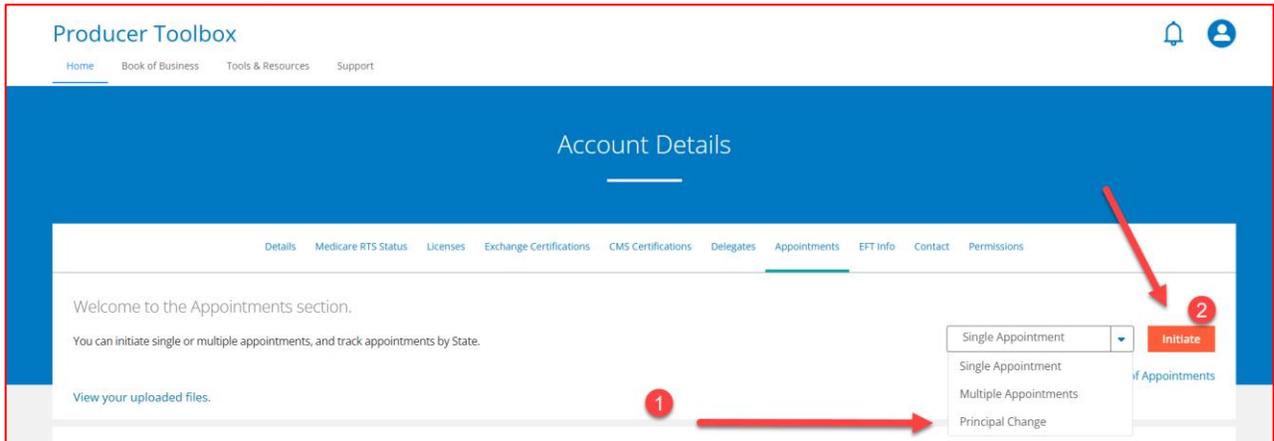
3 Select 'Appointments'.



4 Select Drop Down.



Select 'Principal Change', then select 'Initiate'.



- 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.

Producer Toolbox

Home Book of Business Tools & Resources Support

← Back to Appointments New Products Available

Principal Change

Complete the Principal's information below.

To appoint a new Agency Principal, please enter the new Principal's information below. Once this form is submitted, an email will be sent to the new Principal's email address with further instructions to complete the appointment.

Agency Name Agency Tax ID

Name of Principal on Record

New Principal Last Name * New Principal Social Security Number *

New Principal Email Address *

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.

Producer Toolbox

Home Book of Business Tools & Resources Support

← Back to Appointments New Products Available

Principal Change

Complete the Principal's information below.

To appoint a new Agency Principal, please enter the new Principal's information below. Once this form is submitted, an email will be sent to the new Principal's email address with further instructions to complete the appointment.

Agency Name Agency Tax ID

Name of Principal on Record

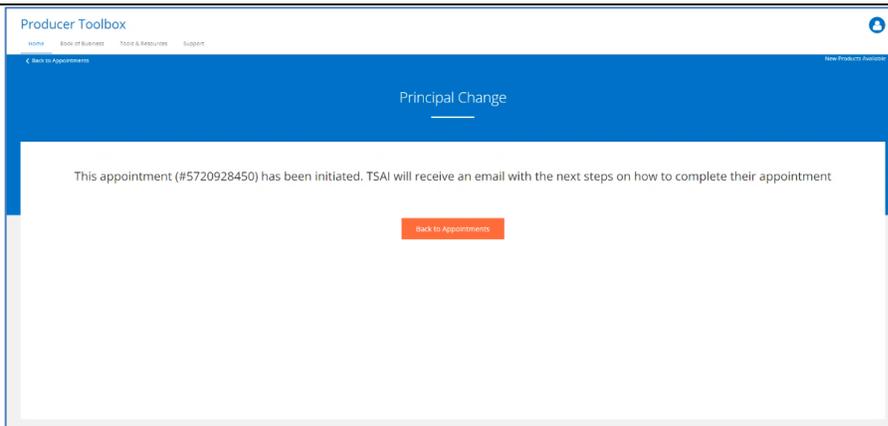
New Principal Last Name * New Principal Social Security Number *

New Principal Email Address *

The agency principal Cerio does not have the required license qualifications for CT-A. You cannot proceed until the correct requirements are met.

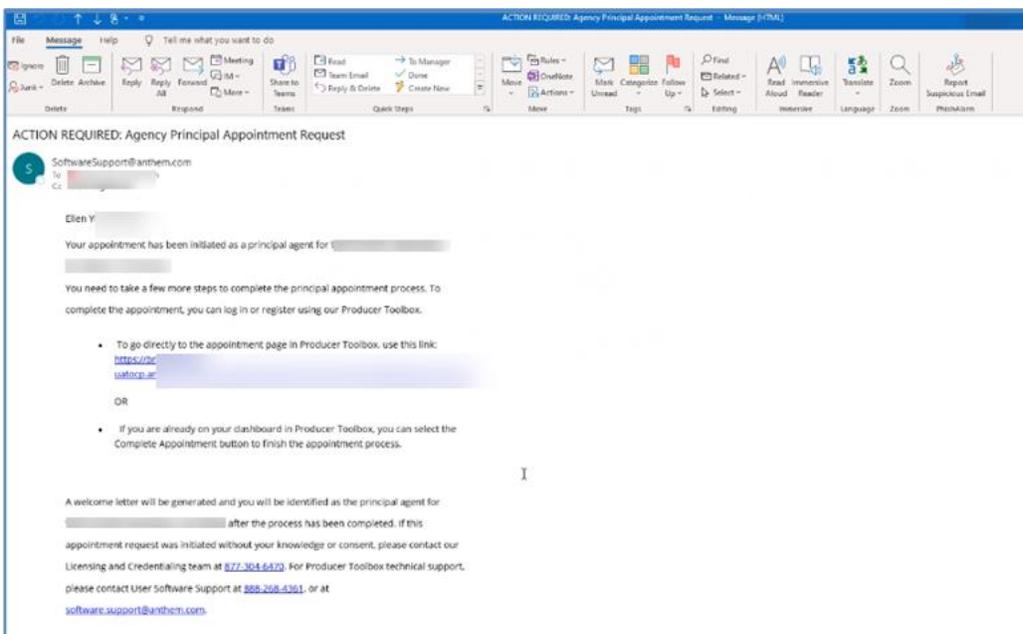
Note: If you're trying to set up an agent as the principal of a new agency, and they are already a principal of another agency, you'll need to first replace them in their current role. Only then can they take on a new principal position in another agency. This ensures that an agent isn't the principal of more than one agency at a time.

- 6 A success message will appear if a valid principal is selected.



7 The new principal will receive email with additional instructions.

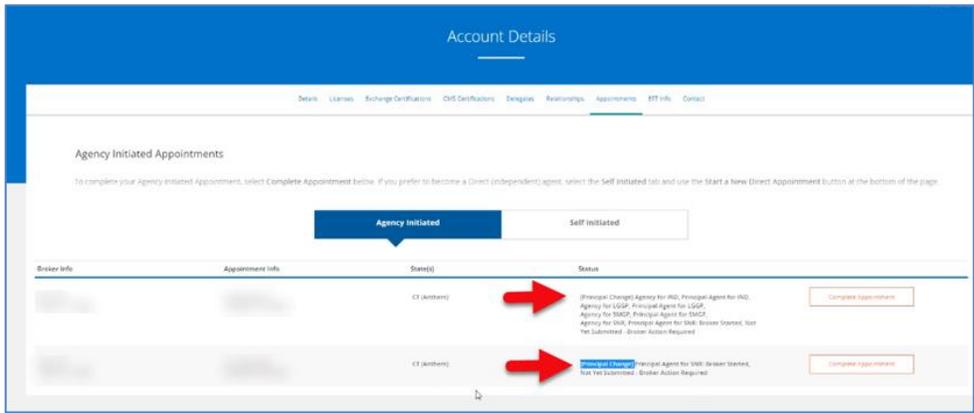
An **existing** agent will receive the following email:



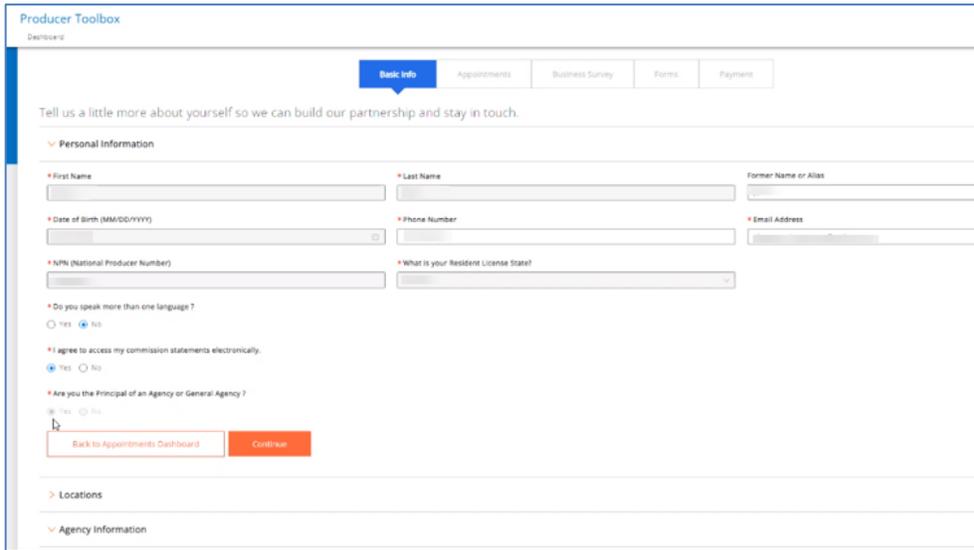
A **new** agent that needs appointed will receive the following email:



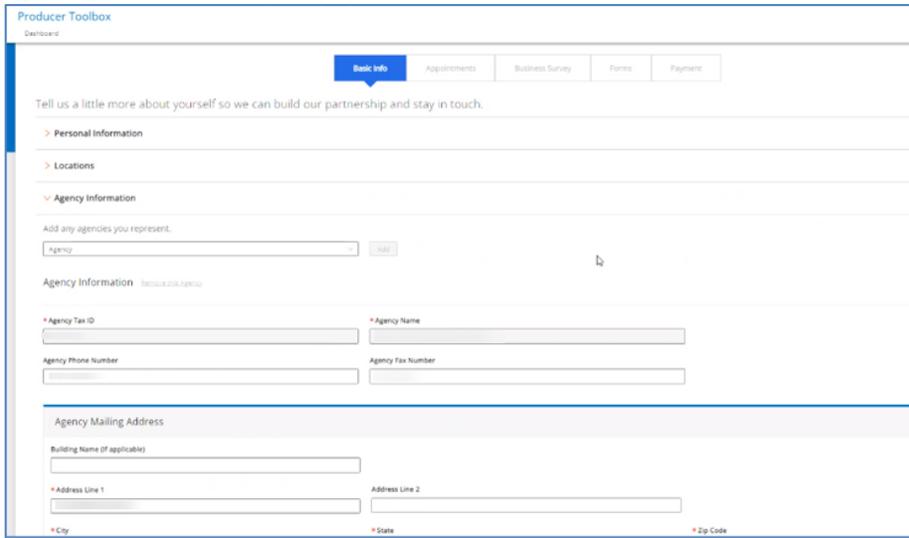
8 After clicking the link, the agent will be navigated to the Broker Portal. To differentiate the principal change, the **'Status'** will reflect **'Principal Change'** in the Dashboard.



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.

Producer Toolbox
Dashboard

Basic Info | **Appointments** | Business Survey | Forms | Payments

Let us know what state(s) you want to be appointed in. Only the states you're licensed in will show below.
Lines of Business (LOBs) you already sell are not displayed.

States	Brand	Line Of Business	Agent Type	Exchange Relationship
<input type="checkbox"/> Arizona	Amerigroup	Select a line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> California	Anthem	Select a line of business	Select an Agent Type	<input type="checkbox"/>
<input checked="" type="checkbox"/> Connecticut	Anthem	Individual Large Group Small Group Senior	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Florida	Sunlife Health	Select a line of business	Select an Agent Type	<input type="checkbox"/>
<input checked="" type="checkbox"/> Georgia	Anthem	Select a line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> Indiana	Anthem	Select a line of business	Select an Agent Type	<input type="checkbox"/>
<input checked="" type="checkbox"/> Kentucky	Anthem	Select a line of business	Select an Agent Type	<input type="checkbox"/>
<input type="checkbox"/> Louisiana	Joint Venture (CBCS of LA)	Select a line of business	Select an Agent Type	<input type="checkbox"/>

11 Forms will need to be re-signed to account for the principal change and then click 'Continue to Payment'.

Producer Toolbox
Dashboard

Appointments: 11/29/2021 | Status: Connecticut | Created By: BFTech@1017

Check Your Progress | **Forms** | Payments

General Documents (2)

- Broker Information Summary
- WR_2015

BAA - ANTHEM Documents (1)

- Anthem Broker BAA October 2021

Connecticut Documents (8)

- AAC Life Contract OH IN KY CT 10/20/2021
- 2015 ACD Broker Agreement 10/20/2021
- 2016 QWP Amendment ACD 10/20/2021
- 2017 Basic Rule Amendment ACD 10/20/2021
- 2018 CT Agent Agreement 10/19/2021

Instructions

To complete your forms request you can:

1. Use the left menu to select each document.
2. Scroll through each document on the left.
3. Or jump to sign documents.

Viewed sections will show a 

Here are the documents to complete your requested Appointments.

Summary

Appointment

Personal Information

First Name: Last Name: Former Name or Alias:
Date of Birth: Phone Number: Email Address:

APN (National Product Number)

[Back to Business Survey](#) [Continue to Payment](#)

Producer Toolbox
Dashboard

General Documents (2)

- Broker Information Summary
- WR_2015

BAA - ANTHEM Documents (1)

- Anthem Broker BAA October 2021

Connecticut Documents (8)

- AAC Life Contract OH IN KY CT 10/20/2021
- 2015 ACD Broker Agreement 10/20/2021
- 2016 QWP Amendment ACD 10/20/2021
- 2017 Basic Rule Amendment ACD 10/20/2021
- 2018 CT Agent Agreement 10/19/2021
- 2018 QWP Amendment CT 10/19/2021
- 2017 Basic Rule Amendment CT 10/19/2021
- PRODUCER MISC Anthem 11_2021

Sign Documents

By selecting the checkbox you acknowledge and agree that you are signing the documents electronically, your electronic signature is the legally binding equivalent to your handwritten signature.

First Name: Last Name:
Today's Date: 1/6/2022

I have read and accept all documentation presented.

[Back to Business Survey](#) [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.

Producer Toolbox
Dashboard

A breakdown of your appointment fees are below. Please make sure everything is correct, fill in your payment details and submit your payment.

Appointment #: [REDACTED] Fees Summary

Description	Amount
Connecticut Appointment Fee	\$452.82
NIPR License Verification Fee	2.20
Total (2items): \$455.02	

Payment Method
 Bank Account Credit/Debit Card

Account Type
 Checking Savings

Name Of Person on Account [REDACTED] Bank Name
 WELLS FARGO BANK NA

Routing Number [REDACTED] Re-enter Routing Number [REDACTED]

Account Number [REDACTED] Re-enter Account Number [REDACTED]

Account Address
 Same as Mailing Address
 Building Name (if applicable) [REDACTED]
 Address Line 1 [REDACTED]
 Address Line 2 [REDACTED]
 City [REDACTED] State [REDACTED]

If payment is needed and provided, the below success message will display.

Producer Toolbox
Dashboard

Appointment: 5720928400 States: Connecticut Created By: BPTestUser14573

Check Your Progress If you need help along the way, contact Licensing and Credentialing at 1-877-304-6470 (9:00 AM - 4:30 PM ET)

Payment Success


 Success! Your application has been submitted. We'll notify you at the email address on file once our review is complete. You can also log in to the Producer Toolbox and check for updates on your Dashboard.

[Back to Dashboard](#)

- 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:

From: SoftwareSupport@anthem.com <Software.support@anthem.com>
Sent: Thursday, January 6, 2022 4:14 AM
To: [REDACTED]
Subject: Agency Principal Appointment Incomplete

Agent,

The appointment [REDACTED] as the principal agent for [REDACTED] has been denied.

The reason for the denial of this appointment request is Negative Business Survey.

If you have any questions about this process, please contact our Licensing and Credentialing team at [877-304-6470](tel:877-304-6470).

Thank you for being a valued partner.

Licensing & Credentialing Team

Primary user will receive email if the submission is denied:

From: SoftwareSupport@anthem.com <Software.support@anthem.com>

Sent: Thursday, January 6, 2022 4:14 AM

To: [REDACTED]

Subject: Agency Principal Appointment Incomplete

Agent,

The appointment [REDACTED] as the principal agent for [REDACTED] has been denied.

The reason for the denial of this appointment request is Negative Business Survey.

If you have any questions about this process, please contact our Licensing and Credentialing team at [877-304-6470](tel:877-304-6470).

Thank you for being a valued partner.

Licensing & Credentialing Team

Note: Once a Primary initiates a principal change it cannot be recalled.