



Desk Reference Training Guide

Overview

We are continuing our efforts to consolidate the separate Legacy Broker Portal platforms into one location where you can access data.

The **Producer Toolbox** provides a comprehensive location for brokers to utilize:

- Access to M.A.D.E and Agent Data Entry (ADE)
- Application Status
- Book of Business
- Subscriber Billing
- Subscriber Detail
- Access to View EOCs (Evidence of Coverage)
- Commission Statements

Access your Medicare Advantage and Medicare Supplement business via the Producer Toolbox environment



Accessing the Producer Toolbox Homepage

To Access the **Producer Toolbox** website, you will:

1. Access the broker portal via:

https://brokerportal.anthem.com/ehb/web/ bkr/acc/login.htm?wlp-brand=bcc

2. Log into the website using your existing credentials.

You will then be navigated to the **Producer Toolbox** homepage.



Welcome to the Producer Toolbox

This Producer Toolbox makes it easier than ever for you to access tools and resources to help you sell and retain clients on Individual and Small Group Affordable Care Act (ACA) compliant plans. You can also gain access to Large Groups, Medicare and grandfathered plans.



Producer Toolbox Homepage

NOTE: New Enhancements have been made to the existing Producer Toolbox (PTB) Home Page effective August 14th

From the Producer Toolbox Homepage, you can now:

- 1. Create your own personalized **Quick Links** to navigate to the pages you view the most.
- 2. View **Messages** notifying you of important Anthem news and updates.
- 3. Access Links within your Lines of Business in the PTB or Access the Legacy Portals.
- 4. View custom **Alerts** specific to **your** Anthem members.





Applications and Enrollments-Application Entry

To access the application tools:

- 1. Select the **Incoming Business** tab.
- 2. Select the Applications & Enrollments sub-tab.
- 3. Select the **Medicare** tab.
- Click the Enter Paper Applications (M.A.D.E) to submit paper applications OR click on Online Applications (ADE) to enter electronic applications.

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Enter Paper Applications-M.A.D.E Disclaimer

Once you click on the **Enter Paper Applications** button, you will be navigated to the M.A.D.E disclaimer. In order to continue to enter the paper application:

- You will click on the acknowledgement box that you have read the terms.
- 2. You will then select the **Agree** acknowledgement box.

You will be navigated M.A.D.E tool to enter the paper application.

*Note: The disclaimer will be customized to display the brands you are affiliated with according to state/brand type



✤ M.A.D.E.

Legal Agreements

In order to market Medicare Advantage(MA) and Prescription Drug (Part D) plans, the center for Medicare and Medicaid Services (CMS) and Anthem, Inc., mandate that Brokers be in good standing with all state/brand appointment, licensing, annual certification and product training requirements prior to discussing any benefits with current or prospective members, or prior to submitting any enrollments.

Product training and certification requirements are determined by the brand, states, and product in which you are licensed and appointed.

To check if you are in good standing with the necessary requirements for marketing Medicare Advantage and Part D products, please contact us at: Medicare Programs Sales support 1-800-633-4368

By clicking on the box and proceeding to Medicare Application Data Entry to enroll a prospective member; you are attesting that you are in good standing and have met all requirements set forth by CMS and Anthem, inc., for Medicare Advantage and Part D products.

I am authorized to enter applications on behalf of CHRISTOPHER P MCNAMARA

Please read and acknowledge the Legal agreement to Continue.



Enter Paper Applications-M.A.D.E Dashboard

Once you acknowledge the disclaimer, you will be taken into the M.A.D.E dashboard.

 Click on Start New Application to enter your paper application.

*Note: From this dashboard, you may also view applications you have left in progress. For submitted applications, please view the applications in the Producer Toolbox.





Online Applications: ADE Disclaimer

Once you click on the *Access Quotes and Comparison* button, you will be navigated to the Agent Data Entry disclaimer. In order to continue to quote:

- 1. You must select one of the five Brands.
- 2. You will then select the acknowledgement box.
- 3. Click the *Submit* button.

You will be navigated to Agent Data Entry (ADE) to initiate the quote.

*Note: The disclaimer will be customized according to state/brand type.





Applications & Enrollments-Viewing Submitted Applications

To access quote information:

- 1. Select the Incoming Business tab.
- 2. Select the **Applications & Enrollments** sub-tab.
- 3. Select the **Medicare** tab.

The following slide explains the process to Search and List.

*Note: The selection defaults to Individual; the user must click on the Medicare tab in order to access Medicare applications and enrollments.



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Application Search and List

You can search for applicants using the following steps:

- Input the applicant's demographic information into the search fields and select the *Search* button.
- 2. Any returning results will be retrieved from Online Store (OLS) and are available under **Medicare Applications** at the bottom of the page.
- The application status will be visible under the status column under Medicare Applications at the bottom of the page.
- 4. To access the applicant's detailed information, click the *Applicant Name*.

The **Create Report** button will allow you to export the returned information to an excel file.

*Note: The Access Applications and Enrollments button will be displayed if the applications status is any of the following: In-Progress, Active, Approved and Pending.



Application Detail - Screenshot

By clicking on the applicant's name under Medicare Applications in the previous screen, the applicant's detail will populate with the information from ADE.

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tesidential Address 212 ELM St. Vest Bend,WI,53002 Tailing Address	Quoted T	Application otal Monthly Pr Agent Writ Par Req Effectiv	n Status: PENDING remium: \$832.19 ting TIN: CHDMLN rent TIN: ve Date: 01-01-201	LRPZ		Stat Application Receive Last Update Rider	e: WI d: 12-16-2013 d: 04-21-2014 rs: Embeded Medical F	Plan, Embeded Vision Plan
Applicant				Tobacco	Product	Product	Phone Number	Email Address
Applicant Name	Relation	Age	Birth Date	TODUCCO	Type	Requested		



Book of Business

You will access your Book of Business information from the Producer Toolbox Homepage. You will:

- 1. Click the **Current Business** tab.
- 2. Select the **Medicare** sub-tab.
- 3. Enter the member's demographic information.
- 4. Click the Search button.
- To access the member's detailed information, drill into the *Subscriber Name* hyperlink for additional details.

*Note: The default view lists one month of client data. To find clients not listed, use the Search options.



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Access (PPO)

Subscriber Detail - Screenshot

The Member Detail page lists all pertinent subscriber details.

Home	Incoming	Business	Current	Business	Reports	Commissions	Sale	s & Training	Agent Connect
Clients	Billing	Rate Actions	& Renewals						
Subscriber	Details								
Test Member-4	65A1111						<u>v</u> i	ew Evidence of Coverage	Create New Quote/Comparison
Phone Numbe	er	с	ontract Code :	H0564		Agent Writin	ng TIN :	HNKGNMLSSZ	
Residential A	ddroce		Age :	66		Agency Writin	ng TIN :	CCDFGHJKLY	
Residential A	001233		Relation :	SCRBR		Plan	Type :	Medical	
Mailing Addre	55	Original E	Effective Date :	01/01/2015		Plan	Name :	Anthem MediBlue Selec	et (HMO)
-			Birth Date :	01/05/1950		5	Status :	Active	
Email Addres	5		Product Type :	MA (Medicare Ad	vantage)				

Billing				
18 Months Billing History				
Medicare Subscrib	er Details			
Due Date	Amount Due	Paid	Paid Date	Bill Status



Subscriber Billing

To view and run reports for billing information, you will:

- 1. Click the Current Business tab.
- 2. Click the Medicare sub-tab.
- 3. Click the **Billing** sub-tab.
- 4. Enter the Subscriber's demographic information.
- 5. Select the *Search* button.
- 6. Drill into the *Subscriber Name* hyperlink for additional details.

*Note: MA billing information prior to 01/01/2015 is available on the Legacy Portals. The Create Report Button provides the ability to download selected information.





Subscriber Billing Detail - Screenshot

By clicking on the subscriber's name under Medicare Billing details in the previous screen, the billing detail will populate.

Producers and Brokers

Home	Incoming	Business	Current Business	Reports	Commissions	Sales & Training	Agent Connect
Clients	Billing	Rate Actions	& Renewals				

*Notes: For Medicare Supplement billing dates prior to November 1, 2016, please refer to the legacy portal.

For billing details associated to List Bill or 2 Party Member contracts, please contact Agent Services.



Current Business: Medicare Billing: Bill Details

Current Member-46A1111

Payment Date and Type information will be displayed upon payment receipt

Billed Amount Paid	Bill Status:		Plan Name:	IN MPP4 w/o Rx Pre-92 Std.Base+Max+Conv 02/01 Att/Non Dis-MPPIF
	Due Date:	08/01/2016	Plan Type:	Medical
Last Paid Amount	Billed Date:	07/16/2016	Payment Type:	
	Paid Date:		Bill Frequency:	Monthly
	Last Paid Date:		Product Type:	MSUP

Relation:

Evidence of Coverage

You will access the Evidence of Coverage (EOC) information from the Producer Toolbox Homepage. You will:

- Click the **Current Business** tab. 1.
- Select the **Medicare** sub-tab. 2.
- 3. Enter the member's demographic information.
- Click the **Search** button. 4
- 5. To access the member's detailed information, click the Subscriber *Name* hyperlink details.

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Medicare	e Ind	vidual	Small	Group	arge Group	Line of Business F	Preference					
Medicar	e Client Lis	st										
Use the Searc	ch Options to sear	ch for a subscri	ber. Click (on the Subscriber n	ame to view Subscripti	ion details.					Save a	s Quick Link 🏹
Enter	Search Crite	eria										
Select a	Portal:											
Produc	er Toolbox (De	fault)		~								
Primary	Subscriber's N	ame Last Na	ame . Fir	st Name								
State		All Sta	95			3 Agenc	v TIN	CODEGHUKU	(
Member	Status	Activo				Agent	TIN					
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Product	туре	All				SOLT B	У	Subscriber Na	ime - A to Z		•	
Effective	e Date	All			~							4
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earch Criteri	ia											Create Report
Current	t Business N	ledicare S	ubscri	bers								
Subscriber	Name 5	Member Status	State	HCID	Agent TIN	Agency TIN	Plan Name	Product Type	Family ID	Relation	Effective Date	Cancellation Date
		Active	MO		MMHQGNMRNZ	CCDFGHJKLY	, Anthem MediBlue Access (PPO)	MA		SCRBR	01/01/2018	
		Active	MO		MMHQGNMRNZ	CCDFGHJKLY	Anthem MediBlue	MA		SCRBR	01/01/2018	

Access (PPO)



Evidence of Coverage

 Click the View Evidence of Coverage link. This will open up a PDF screen.

*Note: When your cursor is moved over the View Evidence of Coverage link, a message will be displayed: You are about to retrieve a large file, download times may vary.



		Business	Current	Business	Reports	Commissions	Sales & Training	Agent Connect
Clients E	Billing Rate Actions		tions & Renewals					
Subscriber Det BRENDA ABNER - (4	tails (498M6846	0)					View Evidence of Coverage	Create New Quote/Comparision
Phone Number		С	ontract Code :	R5941		Agent Writing 1	IN: KKDPRHTNNZ	
(937) 7874364			Age :	64		Agency Writing	IN: MLMPGQJPTY	
Residential Address 14000 CREEKVIEW SOMERVILLE.OH 45	: s / DR 5064		Relation :	SCRBR		Plan Ty	pe: Medical	
Mailing Address		Original E	ffective Date :	01/01/2014		Plan Nar	ne : Blue Medicare Access V	/alue
-			Birth Date :	06/04/1950		Stat	us: Active	
Email Address brenda.j.holtzman@)gmail.com							

Commissions

- Click the Commissions tab from the Main Menu
- Statements can be downloaded in two options:
 PDF or Excel





Reports Download Center

- 1. Click the **Reports** tab from the Main Menu
- 2. Complete the Report Information for your desired results
- 3. Click on Create Report

*Note: Reports are stored on this page and can be downloaded in Excel format.





Questions?

If you have any questions, please contact Agent Services at <u>medicareagentsupport@anthem.com</u>

