Anthem BlueCross BlueShield

Producer Toolbox User Guide

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.

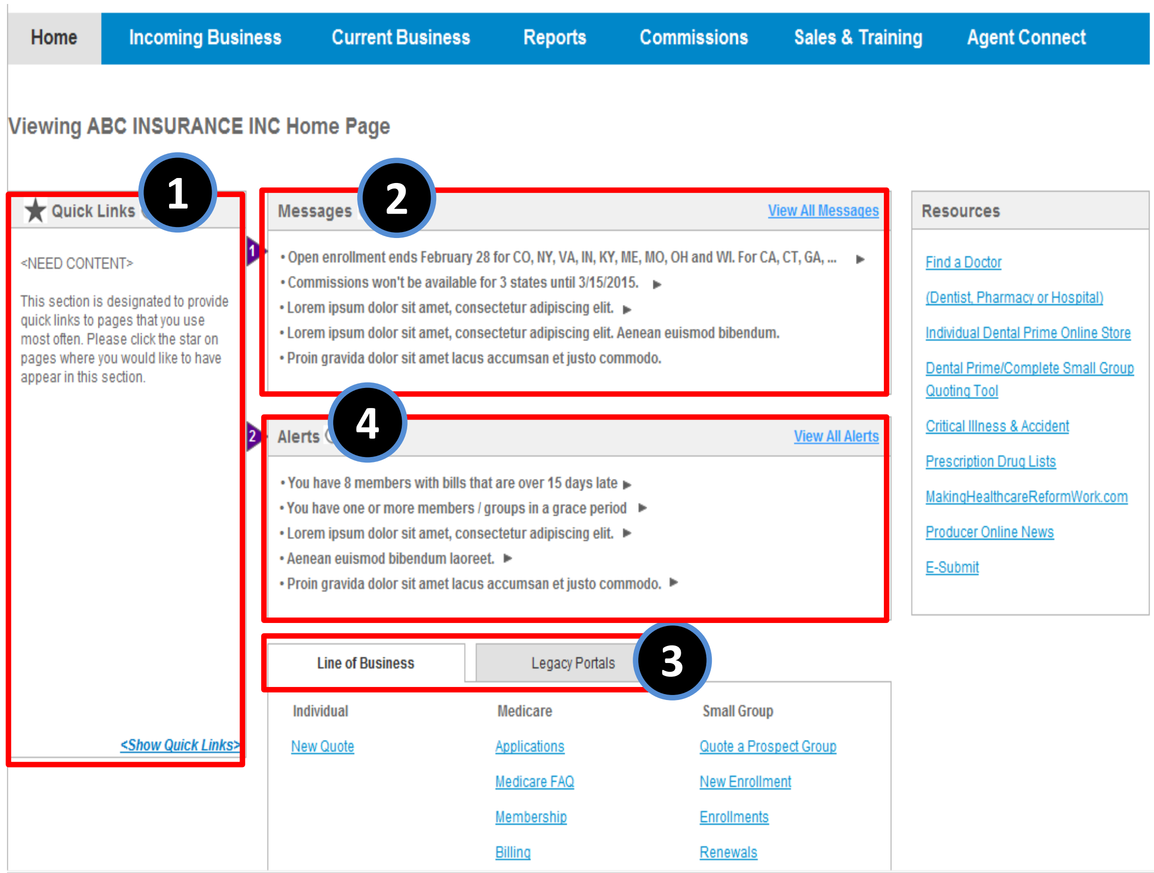
You will then be navigated to the **Producer Toolbox** homepage.

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:

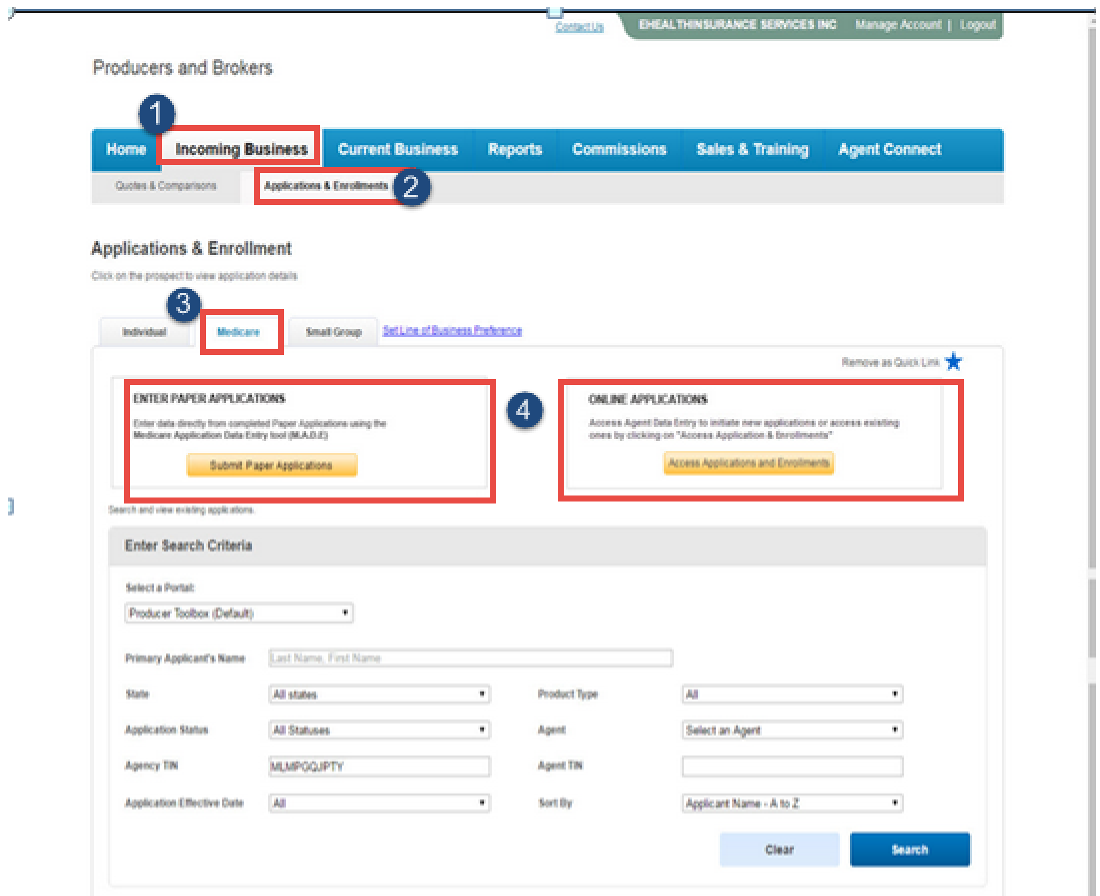
1. Create your own personalized **Quick Links** to navigate to the pages you view the most.
2. View **Messages** notifying you of important Anthem news and updates.
3. Access Links within your **Lines of Business** in the PTB or Access the **Legacy Portals.**
4. View custom **Alerts** specific to **your** 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.
4. Click the Enter **Paper Applications (M.A.D.E)** to submit paper applications OR click on **Online Applications (ADE)** to enter electronic applications.



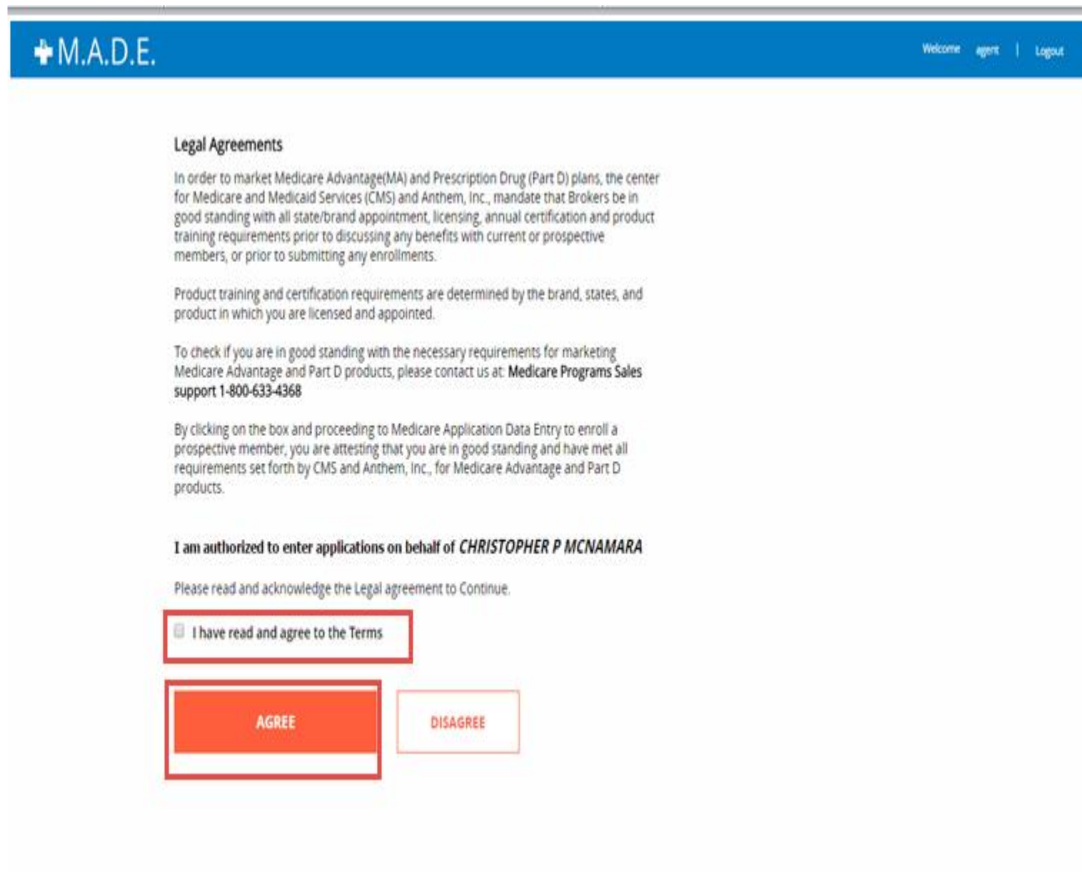
Enter Paper Applications-M.A.D.E Disclaimer

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:

1. 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.

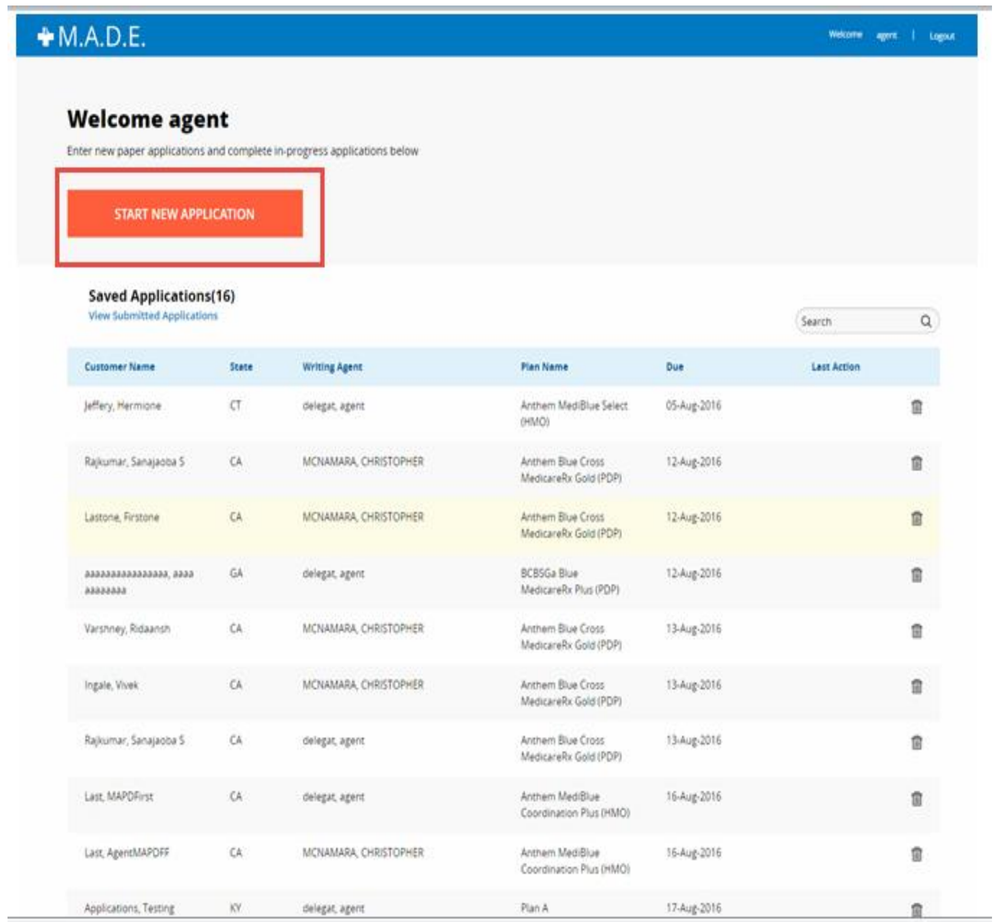
**Note: The disclaimer will be customized to display the brands you are affiliated with according to state/brand type*



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

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

1. 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.*

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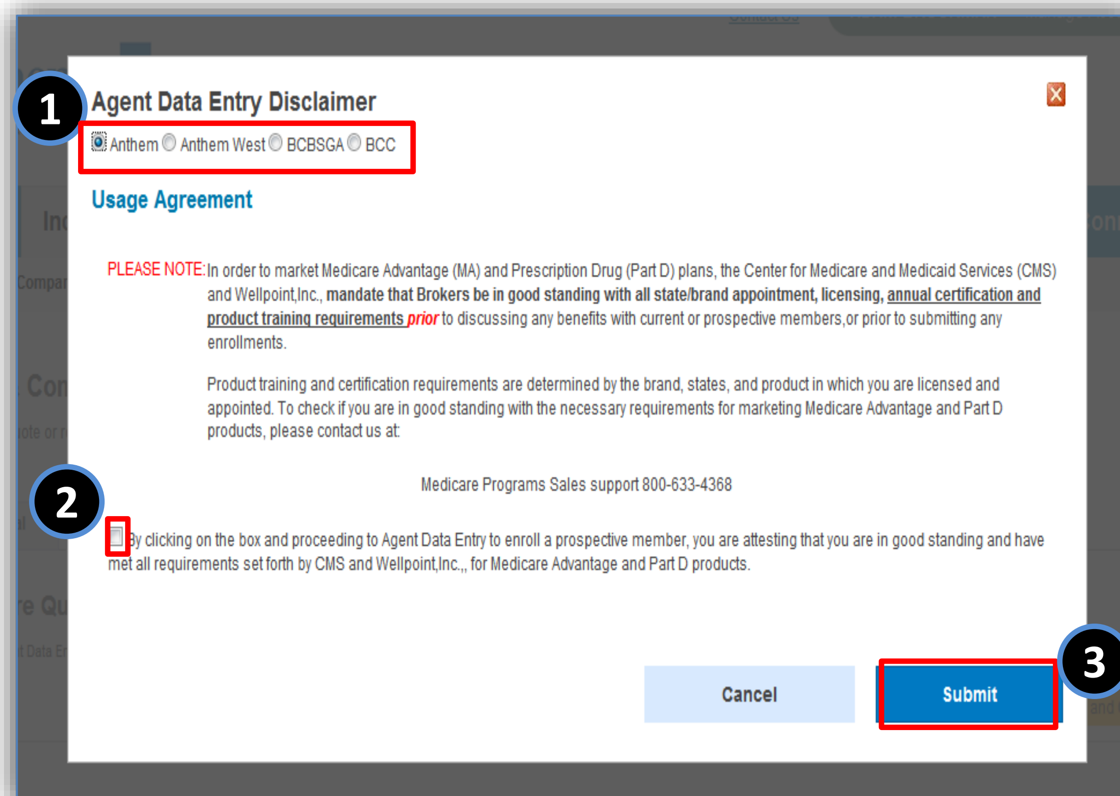
Online Applications: ADE Disclaimer

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.

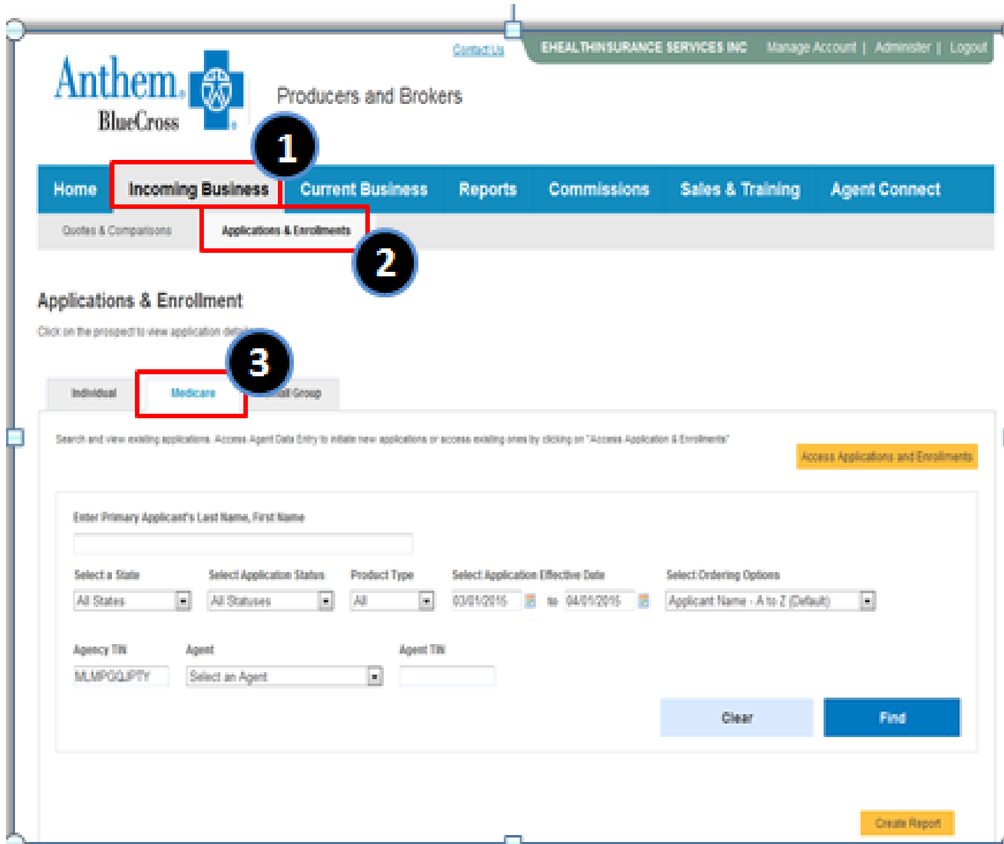
**Note:* *The disclaimer will be customized according to state/brand type.*

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.*

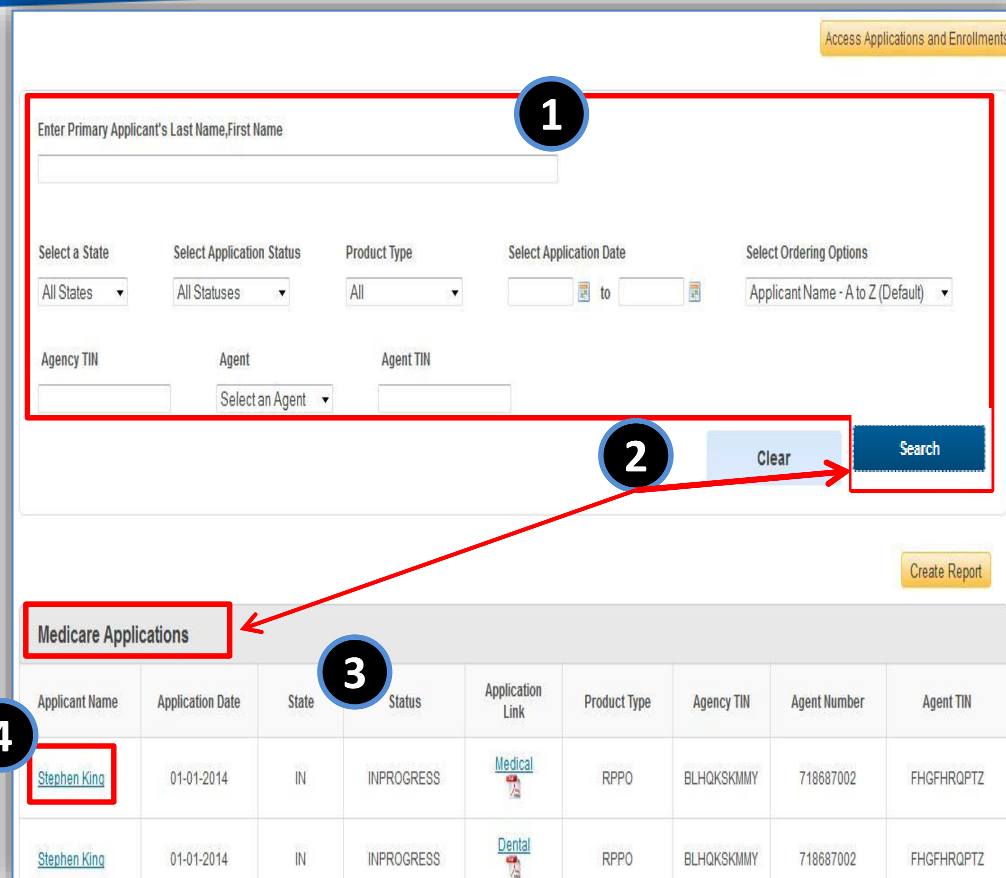
Application Search and List

You can search for applicants using the following steps:

1. 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.
3. 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.*



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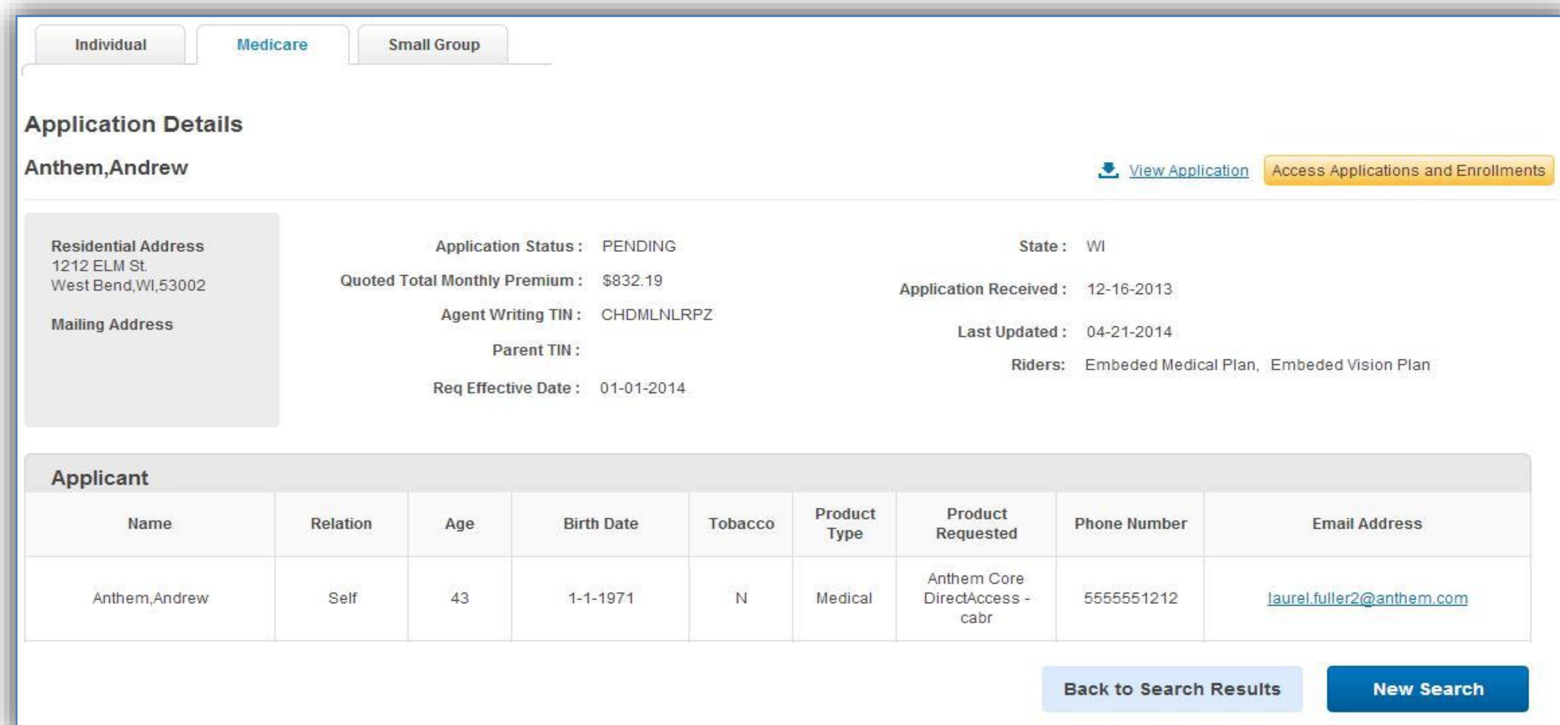
Application Detail - Screenshot

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.

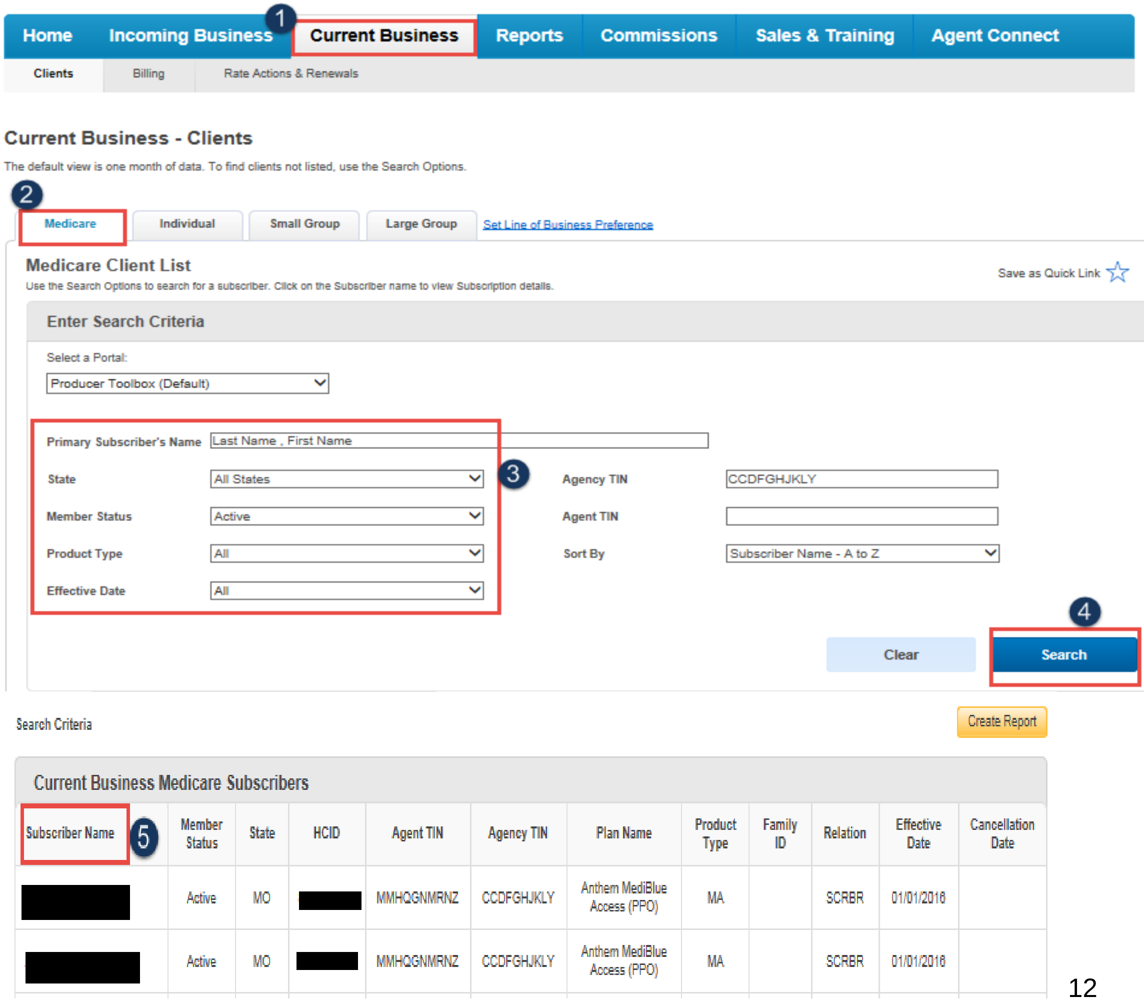


Book of Business

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.
5. 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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Subscriber Detail - Screenshot

The Member Detail page lists all pertinent subscriber details.

Home | Incoming Business | Current Business | Reports | Commissions | Sales & Training | Agent Connect

Clients | Billing | Rate Actions & Renewals

Subscriber Details

Test Member-465A1111

View Evidence of Coverage | Create New Quote/Comparison

Phone Number

Residential Address

Mailing Address

Email Address

Contract Code :	H0564	Agent Writing TIN :	HNKGNMLSSZ
Age :	66	Agency Writing TIN :	CCDFGHJKLY
Relation :	SCRBR	Plan Type :	Medical
Original Effective Date :	01/01/2015	Plan Name :	Anthem MediBlue Select (HMO)
Birth Date :	01/05/1950	Status :	Active
Product Type :	MA (Medicare Advantage)		

Billing

18 Months Billing History

Medicare Subscriber Details

Due Date	Amount Due	Paid	Paid Date	Bill Status

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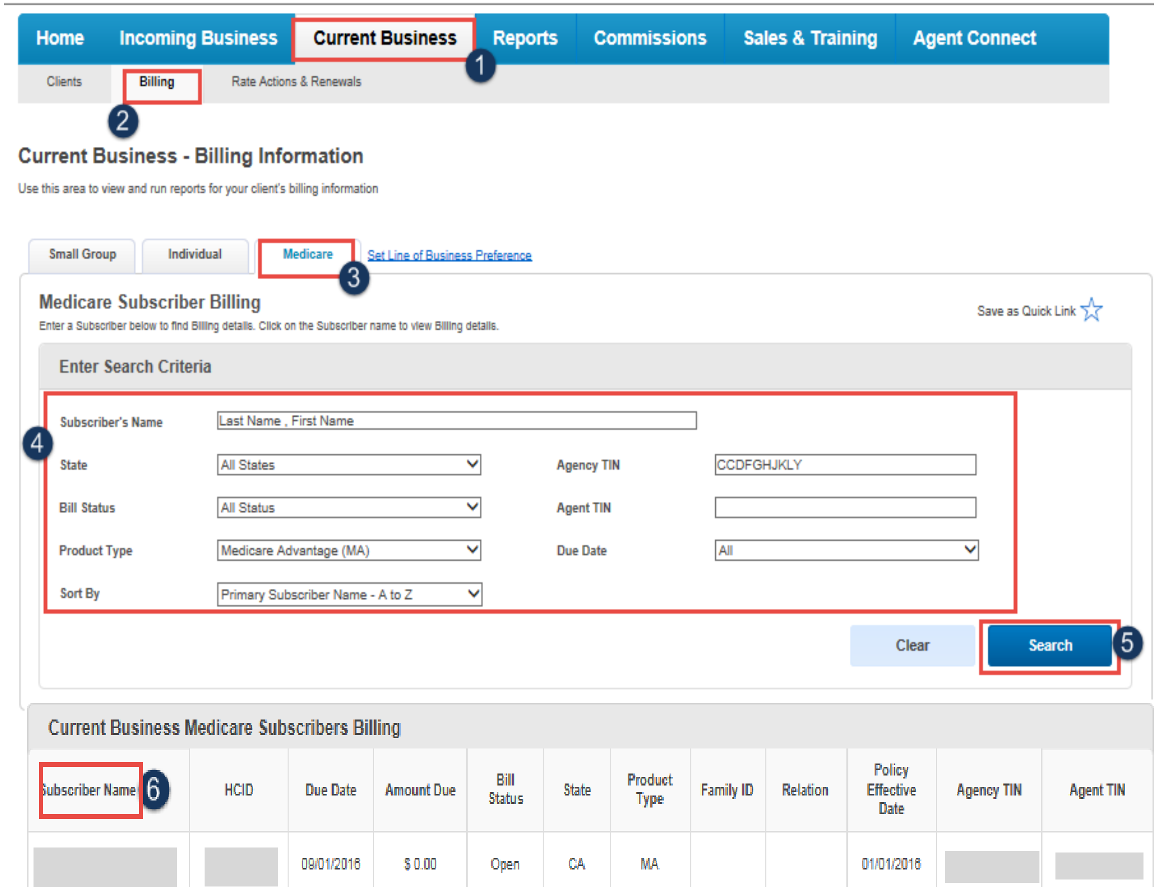
Subscriber Billing

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.*

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Subscriber Billing Detail - Screenshot

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

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.

Producers and Brokers

Home | Incoming Business | **Current Business** | Reports | Commissions | Sales & Training | Agent Connect

Clients | **Billing** | Rate Actions & Renewals

Current Business: Medicare Billing: Bill Details

Current Member-46A1111

Payment Date and Type information will be displayed upon payment receipt

Billed Amount
Paid
Last Paid Amount

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
Billed Date:	07/16/2016	Payment Type:	
Paid Date:		Bill Frequency:	Monthly
Last Paid Date:		Product Type:	MSUP
Relation:			

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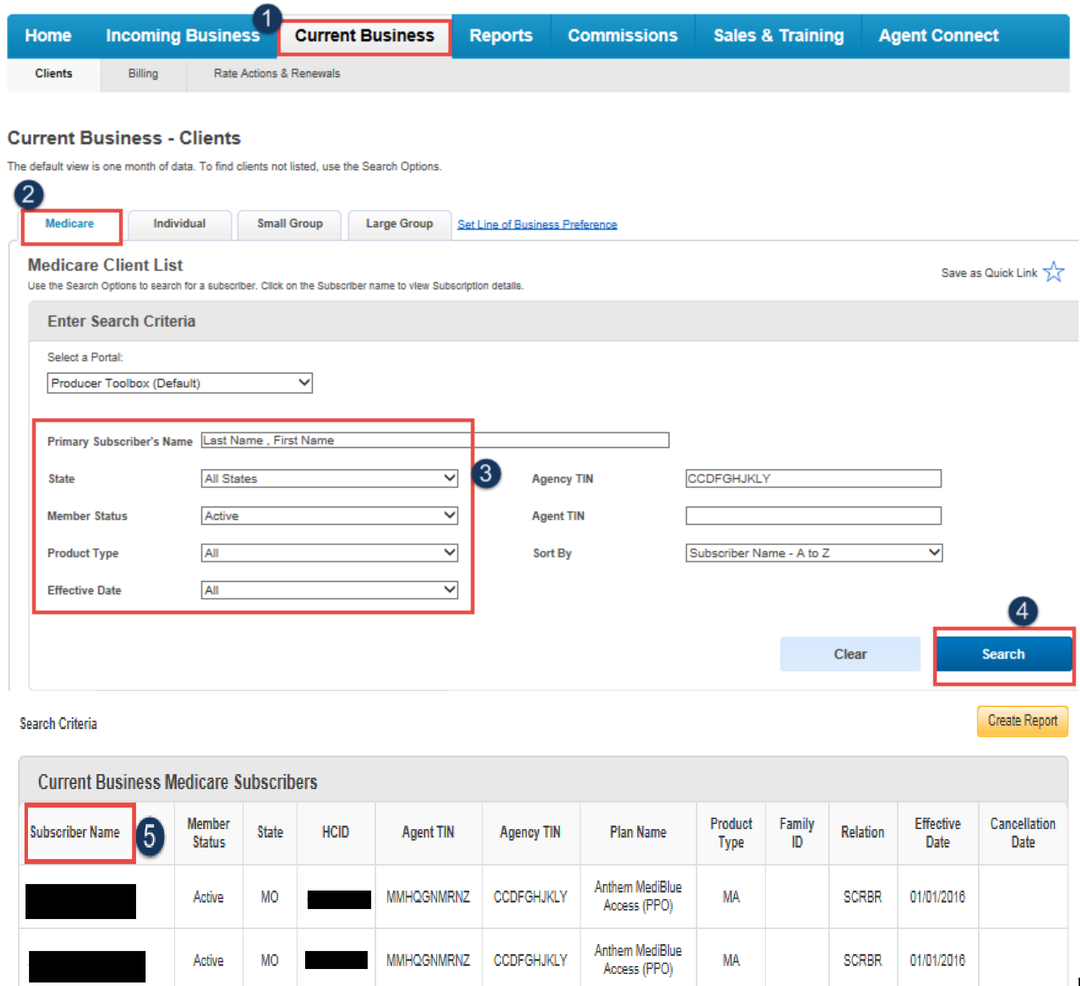
Evidence of Coverage

You will access the Evidence of Coverage (EOC) 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.
5. To access the member's detailed information, click the ***Subscriber Name*** hyperlink details.



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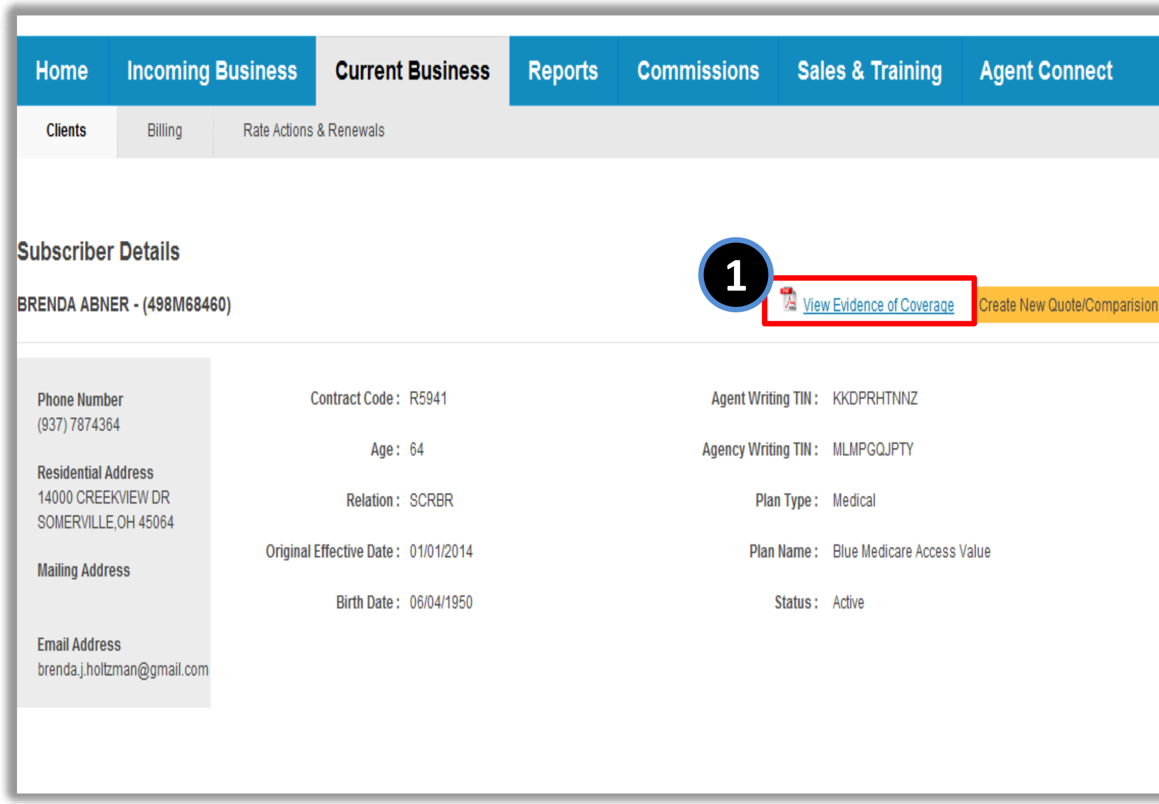
Evidence of Coverage

1. 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.*

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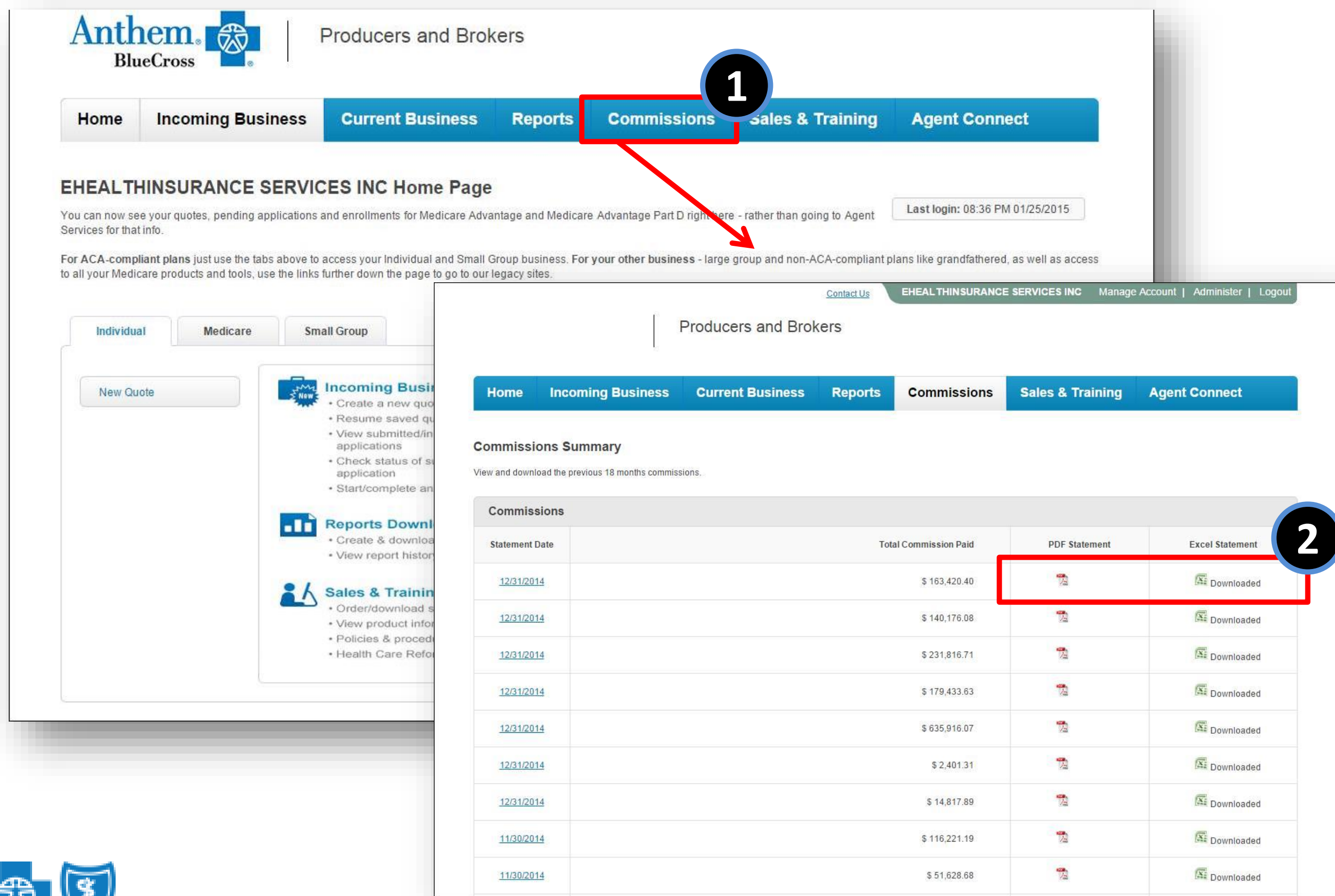
Commissions

1. Click the **Commissions** tab from the Main Menu
2. Statements can be downloaded in two options: **PDF or Excel**



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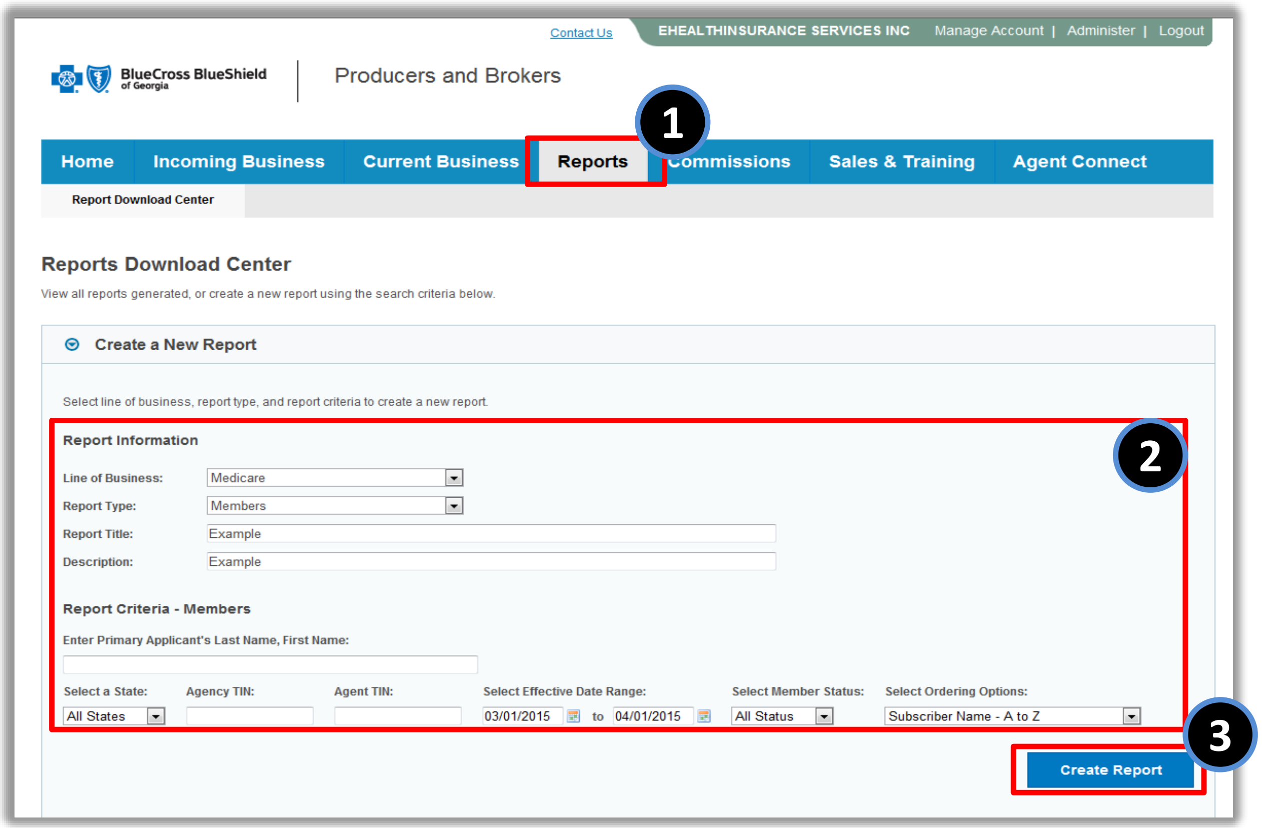
Reports Download Center

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 medicareagentsupport@anthem.com

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