

Access mProducer

1. Log into Producer Toolbox using <https://brokerportal.anthem.com>.
2. Select **Incoming Business**.
3. From the **Medicare** tab, click **Access Electronic Applications and Quotes**.

Create a New Customer, Quote, & Apply

1. From the mProducer Home Page, select the **Customers** tile.
2. Click on the **Create a New Customer** button.
3. Enter the customer's information and click **Create and Quote**.
4. Select the **Coverage Begins** from the **Find Your Plans** section and click **Get Plans**.
5. Click **Apply**.
6. Click **Select Agent**, enter a Parent, Paid, & Writing Agent, and click **Enroll Now**.
7. Complete the application process and click Submit.

Manage Your Customers

1. From the mProducer Home Page, select the **Customers** tile.
2. Search for customers using **FIRST NAME, LAST NAME, and/or DATE OF BIRTH**.
3. Click on the **CUSTOMER NAME** link to generate a new quote or email the customer.

Edit a Customer's In-Progress Applications

1. From the **Customers** tile, click on the **APPLICATION STATUS** for the desired customer.
2. From the pop-up, click on the **ACN** hyperlink to navigate to the electronic application.

View a Customer's Applications

1. From the **Customers** tile, click on the **APPLICATION STATUS** for the desired customer.
2. From the pop-up, click on the **PDF** icon.

Assign a Customer's Applications

1. From the **Customers** tile, click on the **APPLICATION STATUS** for the desired customer.
2. From the pop-up, click on the **Assign** icon.
3. Select the name of the delegate from the drop-down and click **Ok**.

Generate Quotes and View Benefit Summaries without a Customer Record

1. From the mProducer Home Page, select the **Quoting** tile.
2. Complete the **Find Your Plans** section on the left and click **Get Plans**.
3. Click **Benefit Summary** for the desired plan to see the summary of benefits.

Start an Application without a Customer Record

1. From the mProducer Home Page, select the **Quoting** tile.
2. Complete the **Find Your Plans** section on the left and click **Get Plans**.
3. Click **Apply** for the desired plan.
4. Click **Select Agent**, enter a Parent, Paid, & Writing Agent, and click **Customer Details**.
5. Enter the customer's information and click **Enroll Now**.
6. Complete the application process and click **Submit**.

Find a Doctor/Pharmacy/Facility

1. From the mProducer Home Page, select the **Useful Tools** tile.
2. Select the **Find a Doctor, Find a Pharmacy, or Find a Facility** tile.
3. Enter the requested search criteria and click **Continue**.
4. Enter additional search criteria (not required) and click **Search**.
5. A list of providers appear that includes demographic information, new patient and Medicaid acceptance status, language, specialties, PCP ID's, etc. The names of in-network plans within which they participate are also listed.


Find Your Covered Drugs

1. From the mProducer Home Page, select the **Useful Tools** tile.
2. Select the **Find Your Covered Drugs** tile.
3. Enter the name of the drug and select the appropriate dosage from the list that appears.
4. Select **PHARMACY TYPE, QUANTITY, and REFILL FREQUENCY** and click **Add Drug**.
6. Add additional drugs as necessary and click **Next**.
7. Select the desired pharmacy and click **View All Plans**.
8. From the desired plan you can view annual drug costs and click **Show Drug Cost Details** for drug specific costs.

Create a new Electronic SOA Before the Appointment

1. From the mProducer Home Page, select the **Scope of Appointment** tile.
2. Select the **Create New Electronic SOA** tile.
3. The customer should enter his initials next to the plans that will be discussed and sign the SOA.
4. Enter the **BENEFICIARY NAME**, sign the SOA, and click the **Save** button. (Enter other optional fields as necessary before saving.)

Complete the Electronic SOA After the Appointment

5. From the mProducer Home Page, select the **Scope of Appointment** tile.
6. Select the **Electronic SOA List** tile.
7. Click the Edit icon. 
8. Check the plans discussed during the appointment (PDP and/or MA/MAPD).
9. Enter **DATE APPOINTMENT COMPLETED** and click the **Update** button.

Download Paper SOA

1. From the mProducer Home Page, select the **Scope of Appointment** tile.
2. Select the **Download Scope of Appointment Form** tile.
3. Select **English** or **Spanish**. The PDF will appear at the bottom of your browser window.

Upload a Paper SOA

1. From the mProducer Home Page, select the **Scope of Appointment** tile.
2. Select the **Upload Completed Scope of Appointments** tile.
3. Click **Browse** and locate and select the PDF.
4. Click **Upload Scope(s)** button.