Anthem ACA Contracting Directions through Benavest

Anthem Contracting For New Agent

IMPORTANT!

If you are already contracted with Anthem, please refer to **TRANSFER INSTRUCTIONS FOR ANTHEM**.

Carrier States

- **CA, CO, CT, GA, IN, KY, ME, MO, NH, NV, OH, VA, WI**

Step 1: Request Contract

Request Contract from Benavest by emailing office@benavest.com with the Subject: **Anthem ACA: Contracting Request**

Step 2: Confirmation Email

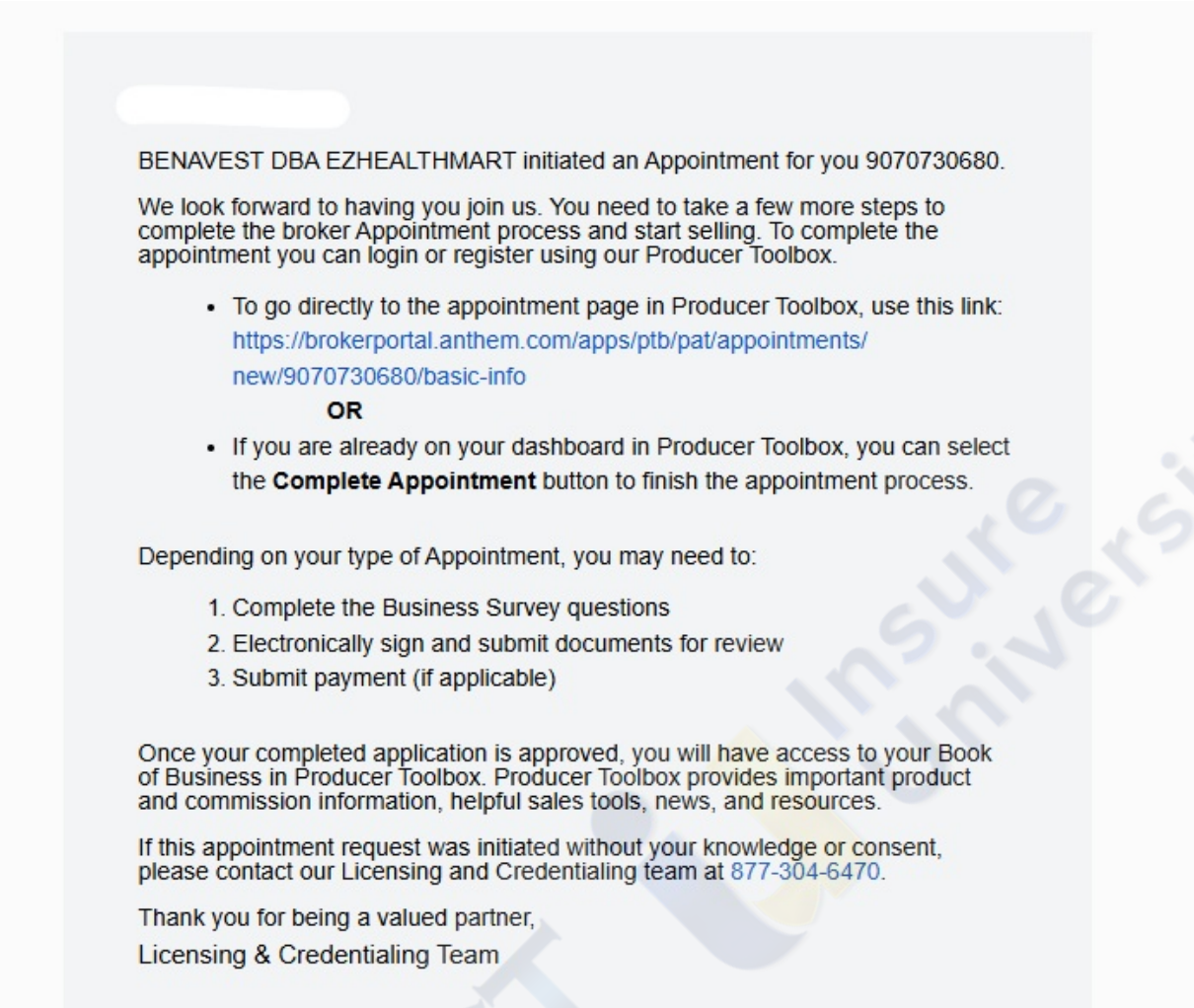
Once Benavest receives your request, you'll be sent an email where you must reply to and confirm the state appointments you want to get appointed with Anthem ACA.

> From: **office@benavest.com**
> Subject: **Anthem ACA - Confirmation of Request**

Step 3: Onboarding Invitation Email

Benavest will send you the onboarding invitation once we confirmed selected state appointments.

> From: **office@benavest.com**
> Subject: **Action Required: Your agency has asked us to appoint you**



BENAVEST DBA EZHEALTHMART initiated an Appointment for you 9070730680.

We look forward to having you join us. You need to take a few more steps to complete the broker Appointment process and start selling. To complete the appointment you can login or register using our Producer Toolbox.

- To go directly to the appointment page in Producer Toolbox, use this link: https://brokerportal.anthem.com/apps/ptb/pat/appointments/new/9070730680/basic-info

OR

- If you are already on your dashboard in Producer Toolbox, you can select the **Complete Appointment** button to finish the appointment process.

Depending on your type of Appointment, you may need to:

1. Complete the Business Survey questions
2. Electronically sign and submit documents for review
3. Submit payment (if applicable)

Once your completed application is approved, you will have access to your Book of Business in Producer Toolbox. Producer Toolbox provides important product and commission information, helpful sales tools, news, and resources.

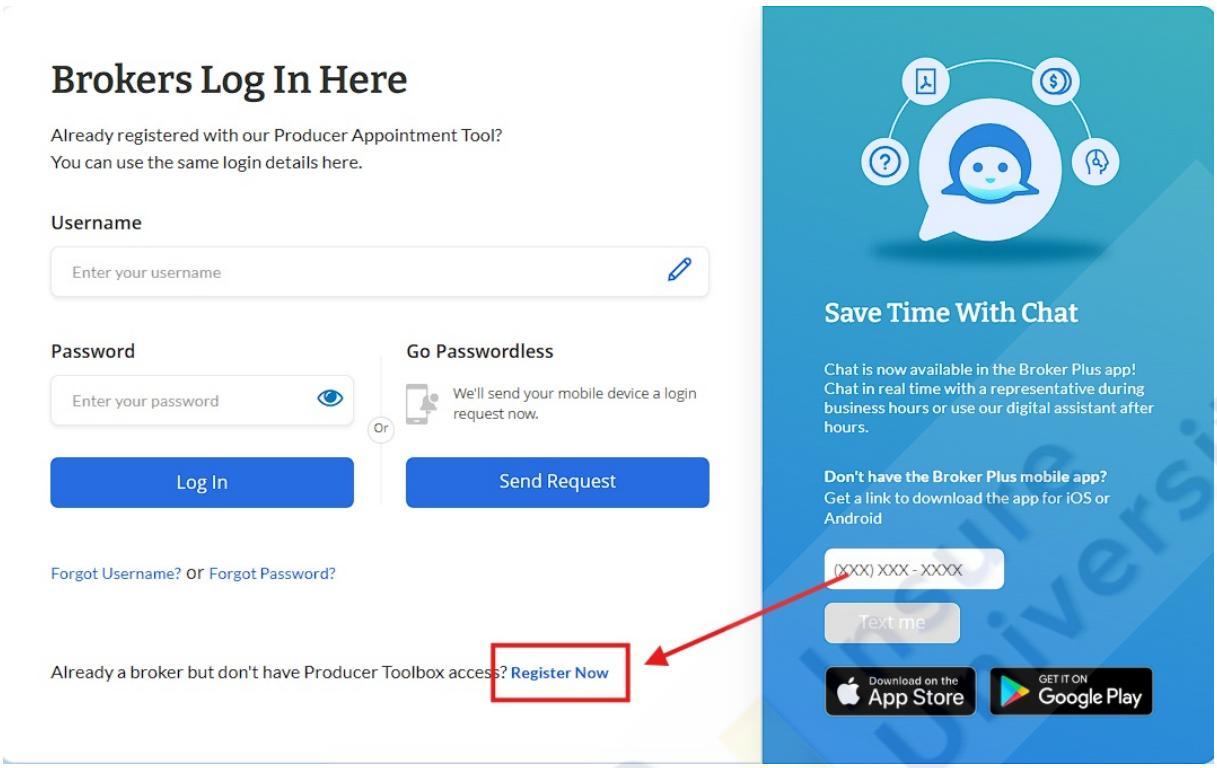
If this appointment request was initiated without your knowledge or consent, please contact our Licensing and Credentialing team at 877-304-6470.

Thank you for being a valued partner,
Licensing & Credentialing Team

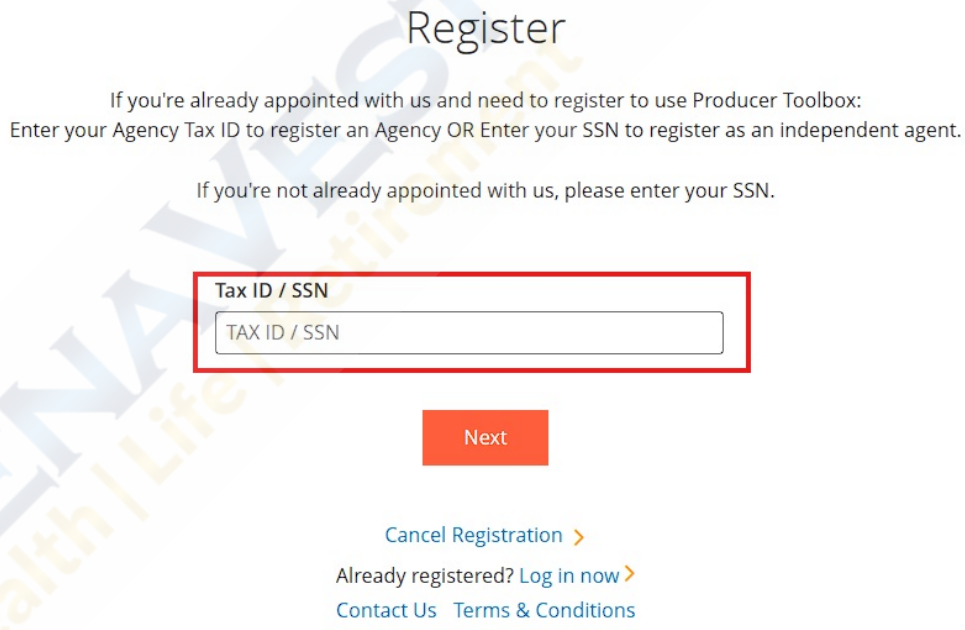
Step 3: Anthem Portal Registration

You will need to register and complete the appointment via the Anthem Broker Portal (Producer Toolbox).

Click on **'REGISTER NOW'** link.



Enter your **SSN** and select **Next**.



Step 4: Complete the Registration Process

Fill out all fields and click **Create Account**.

Please note:

- 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).

Username Rules

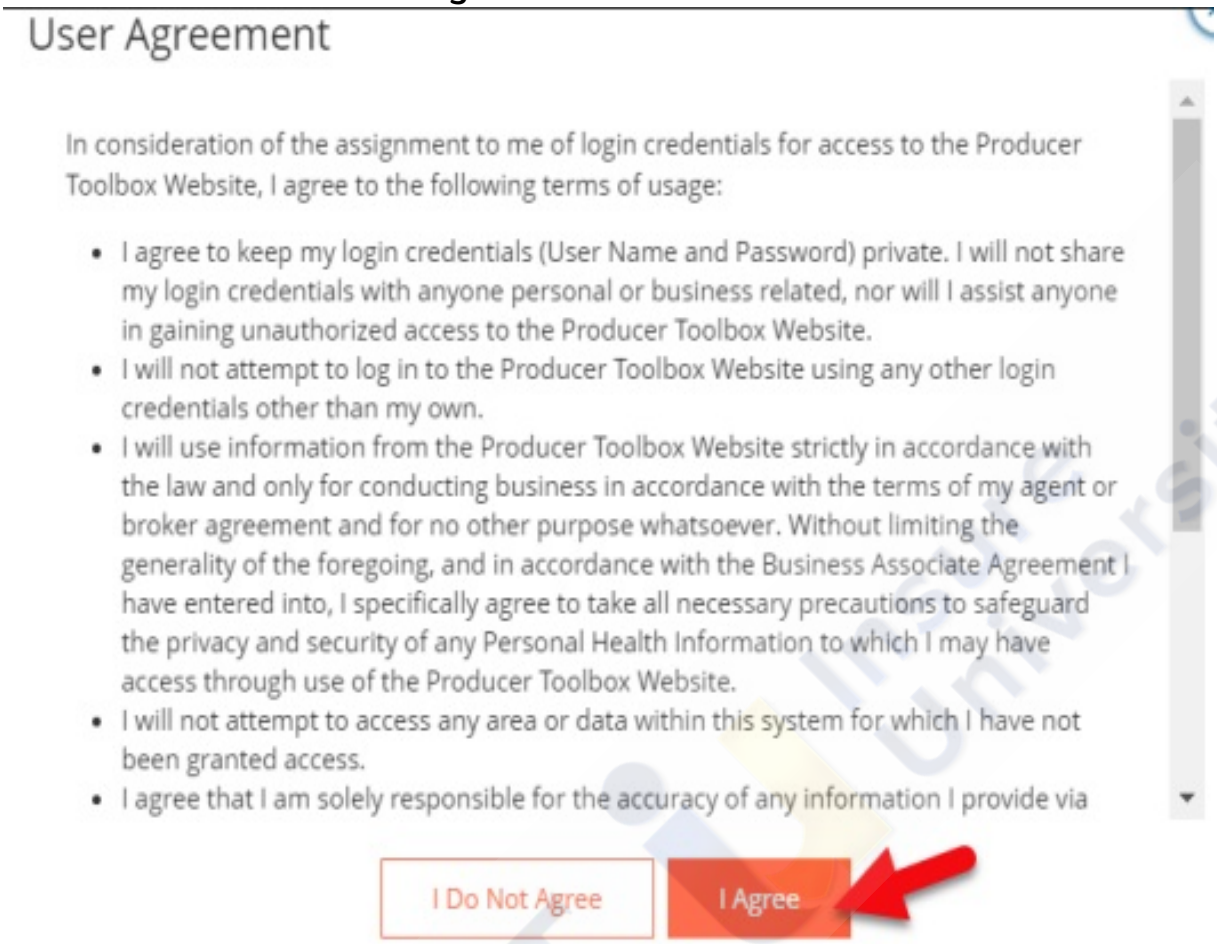
- Username needs to be between 6-20 characters & only letters, numbers or the @ symbol are allowed.
- Username shouldn't start with a number or include spaces.

Password Rules

- Your Password must be more than 8 letters or numbers and should be limited to length 20.

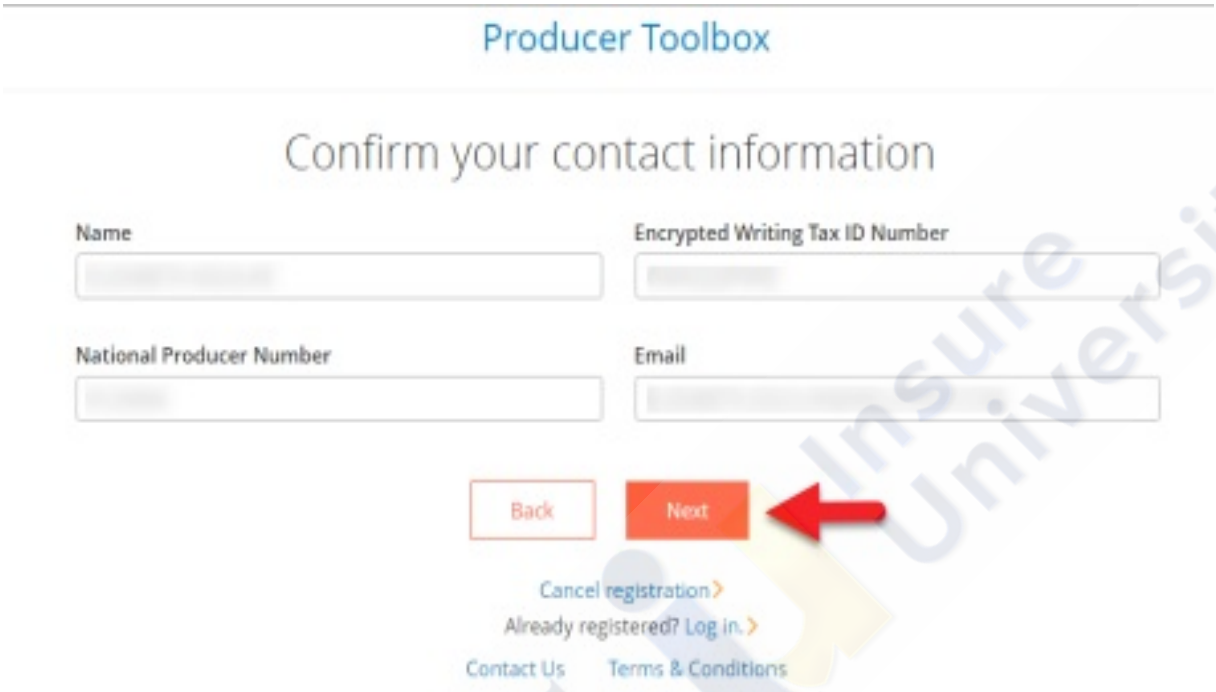
BROKER REGISTRATION AGREEMENT: Click on **Next**

USER AGREEMENT: Click **I Agree**



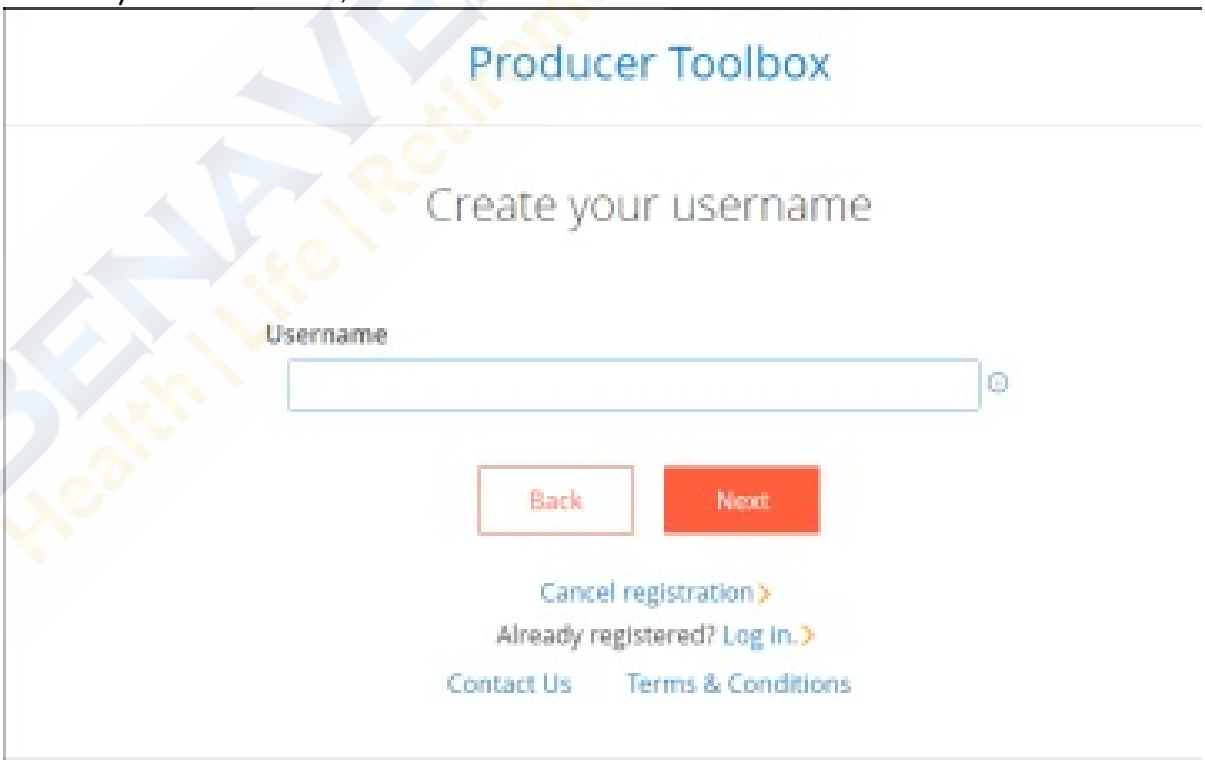
Select **Register as an Independent Agent** and fill out the SSN & Email fields. Click **Next**

Confirm your information is correct:
• If information is correct, click “Next”
• If information is not correct, contact Anthem 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 5: Creating Username

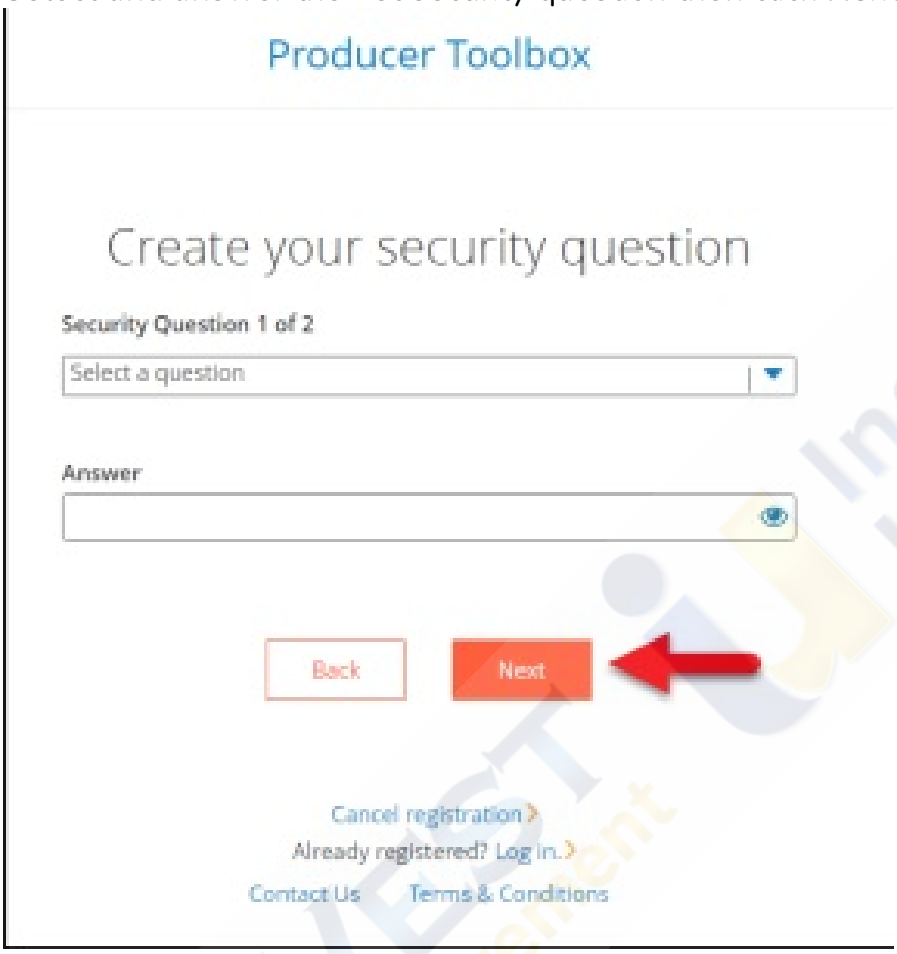
Create your username, then click **Next**



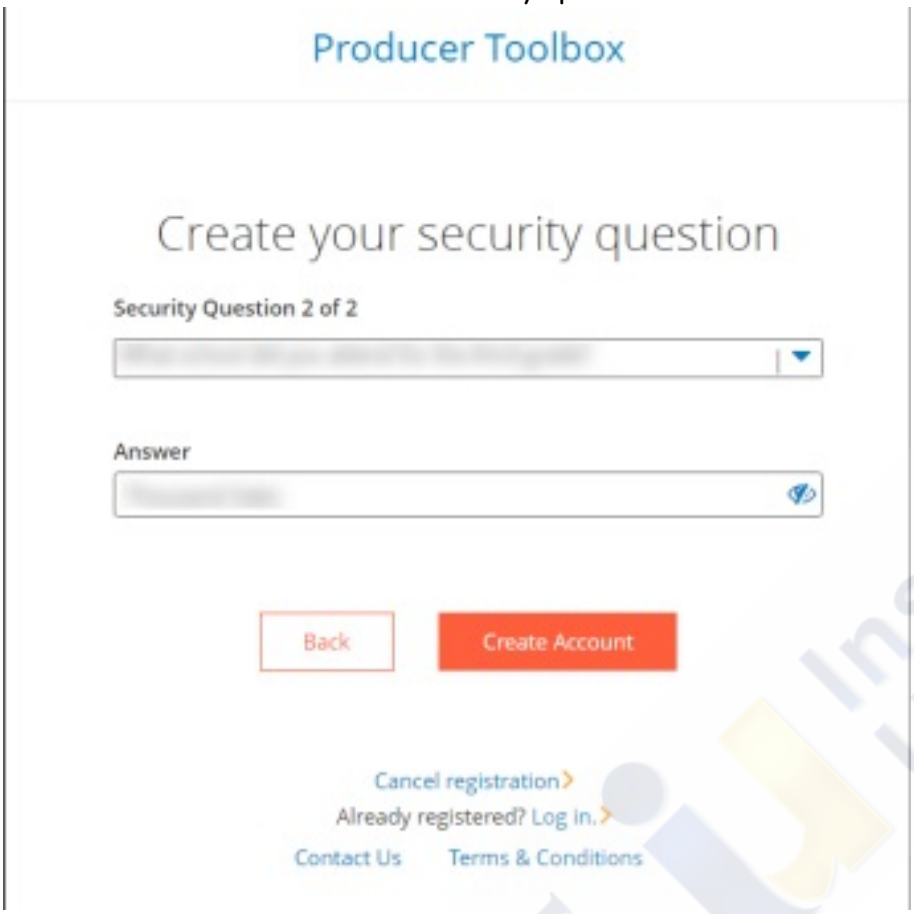
User Name rules:

- 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.

Select and answer the 1st security question then click **Next**



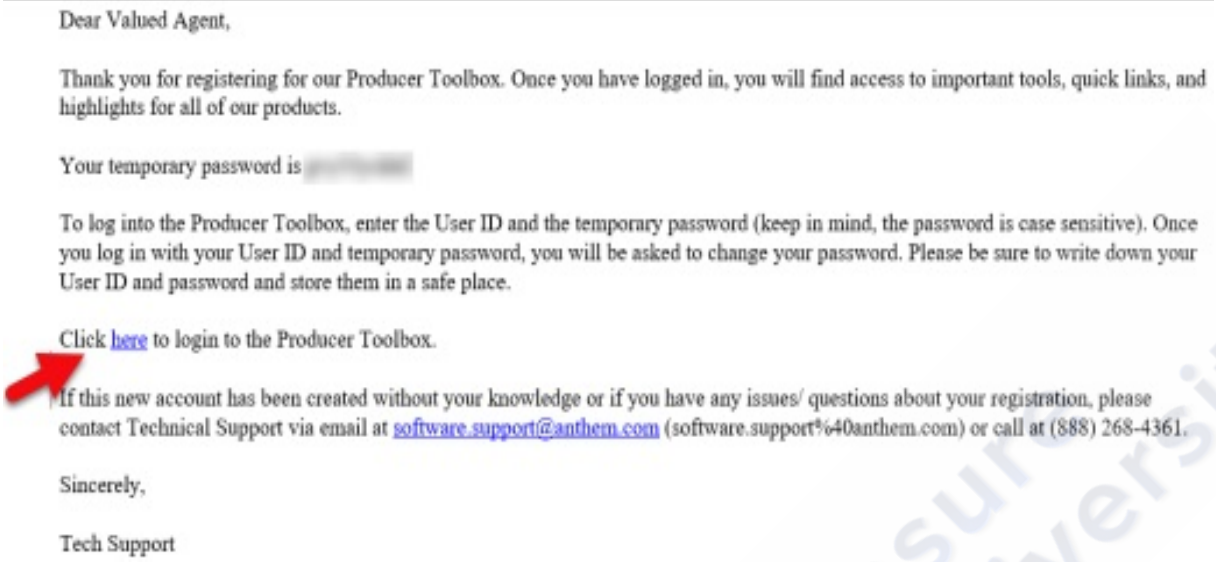
Select and answer the 2nd security question and click **Create Account**:



Step 6: Password

After you the last step, you'll receive this message:

Once you receive your email with your temporary password, click on the link **here**. You will be directed to the portal.



Dear Valued Agent,

Thank you for registering for our Producer Toolbox. Once you have logged in, you will find access to important tools, quick links, and highlights for all of our products.

Your temporary password is [redacted]

To log into the Producer Toolbox, enter the User ID and the temporary password (keep in mind, the password is case sensitive). Once you log in with your User ID and temporary password, you will be asked to change your password. Please be sure to write down your User ID and password and store them in a safe place.

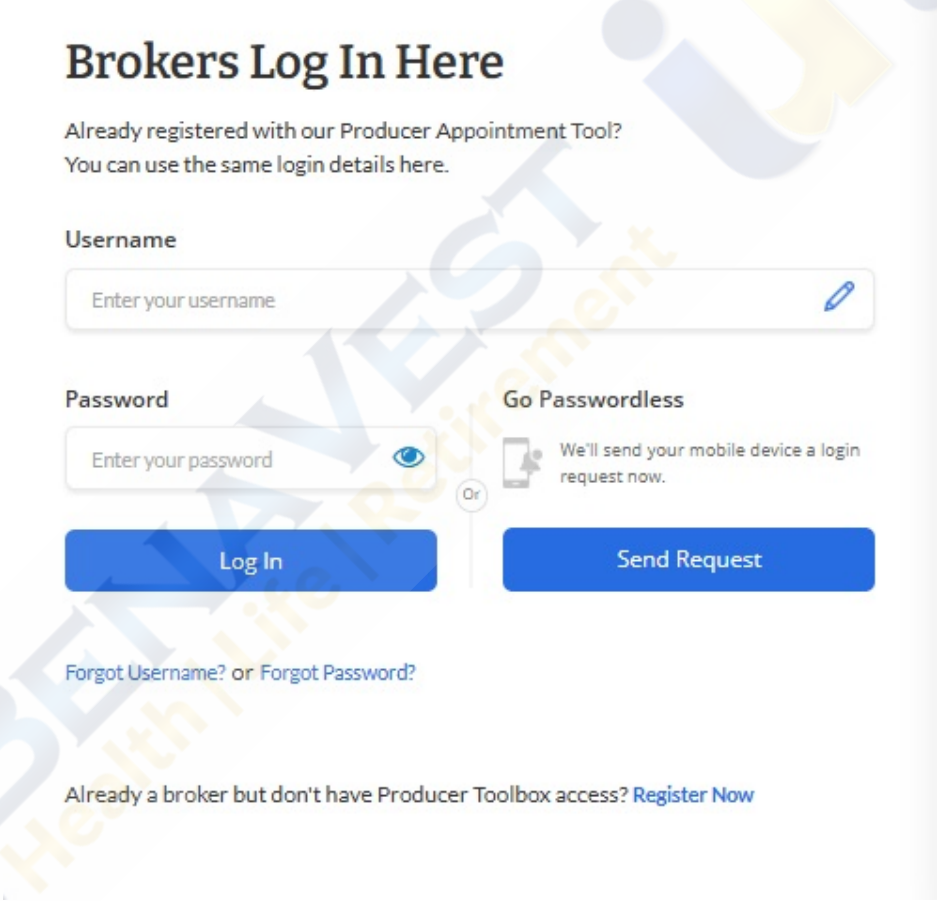
Click here to login to the Producer Toolbox.

If this new account has been created without your knowledge or if you have any issues/ questions about your registration, please contact Technical Support via email at software.support@anthem.com (software.support%40anthem.com) or call at (888) 268-4361.

Sincerely,

Tech Support

Portal log in will appear. Enter your **Username** and the temporary password you were issued and click **Log In**.



Brokers Log In Here

Already registered with our Producer Appointment Tool?
You can use the same login details here.

Username

Enter your username

Password

Enter your password

Go Passwordless

We'll send your mobile device a login request now.

Or

Log In

Send Request

Forgot Username? or Forgot Password?

Already a broker but don't have Producer Toolbox access? Register Now

1. Temporary password – supplied on the email you received
2. Create a new password
3. Confirm your new password
4. Click **Login**

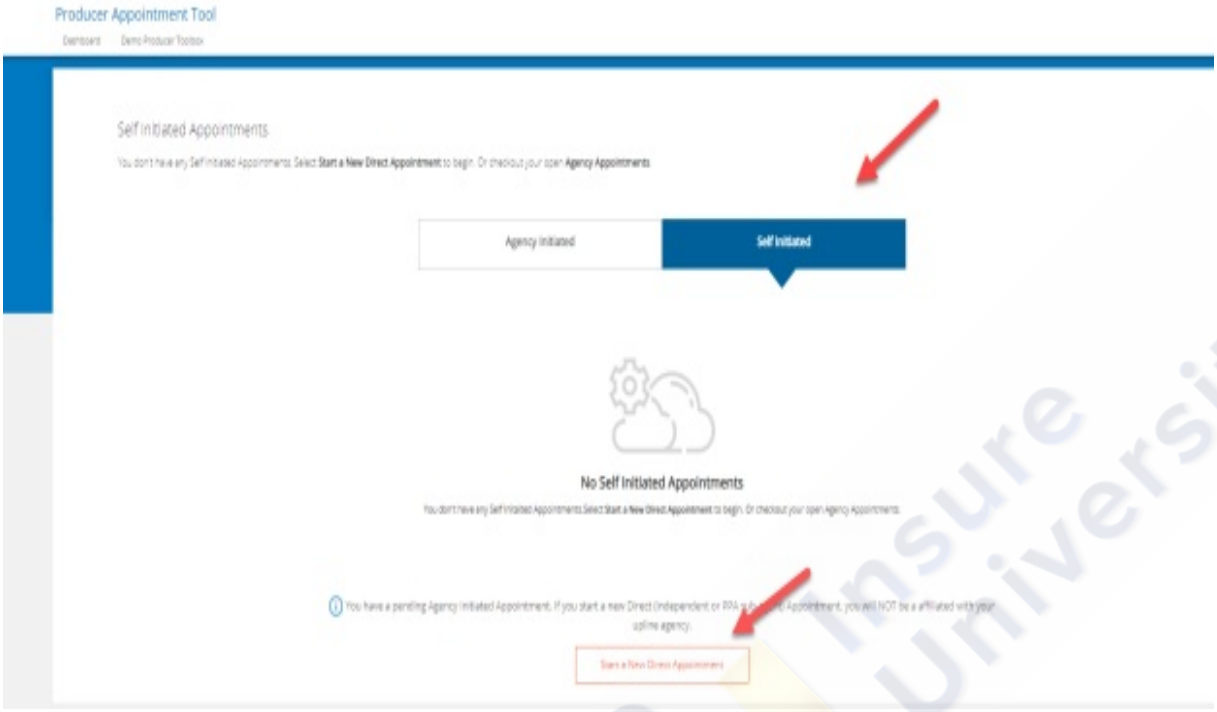
ANNUAL HIPAA ACKNOWLEDGMENT: Ensure the **Agree** checkbox is flagged and click **Submit**.

You may get started on submitting new appointment requests.

Step 7: New Broker Appointment

Log in to your Anthem Broker Portal.

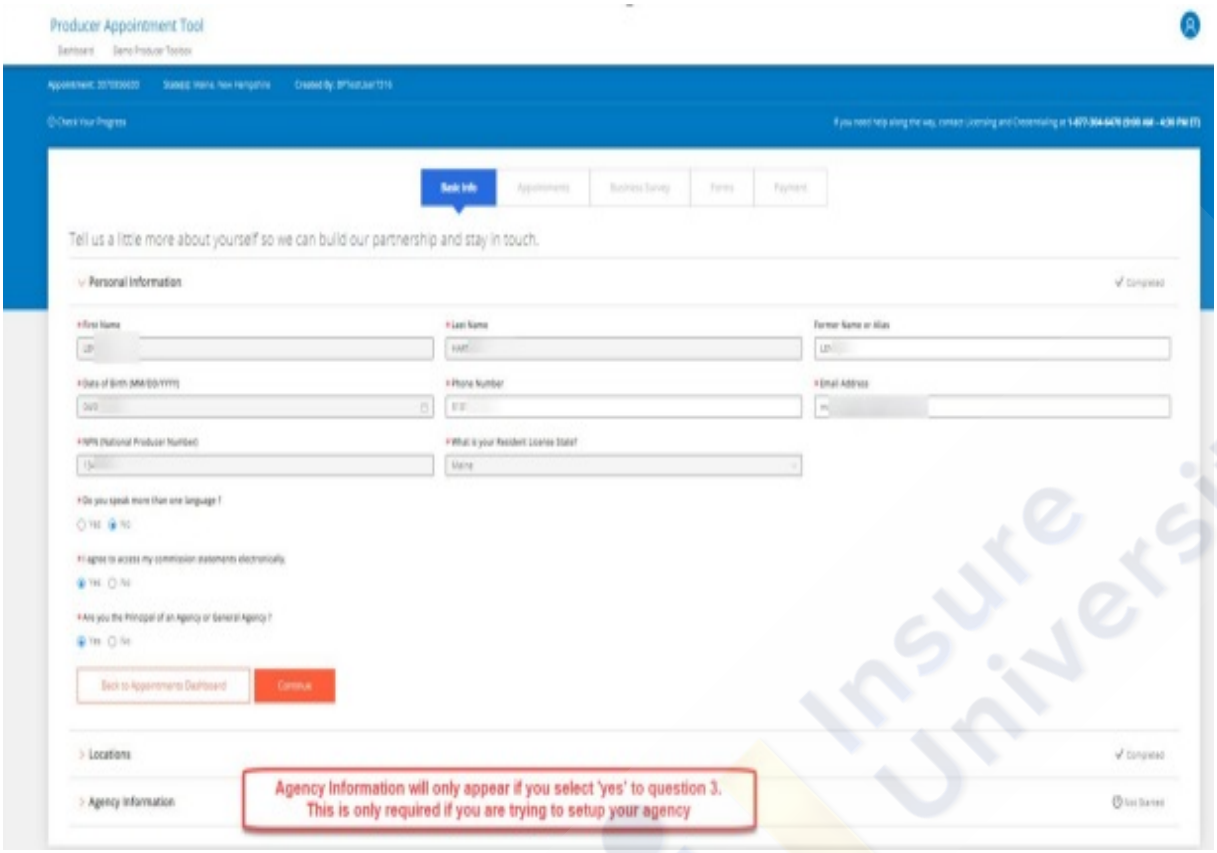
Once logged in, click the **Self Initiated** tab and **Start a New Direct Appointment**.



Populate the required fields (fields with red asterisk) all other fields are prepopulated.

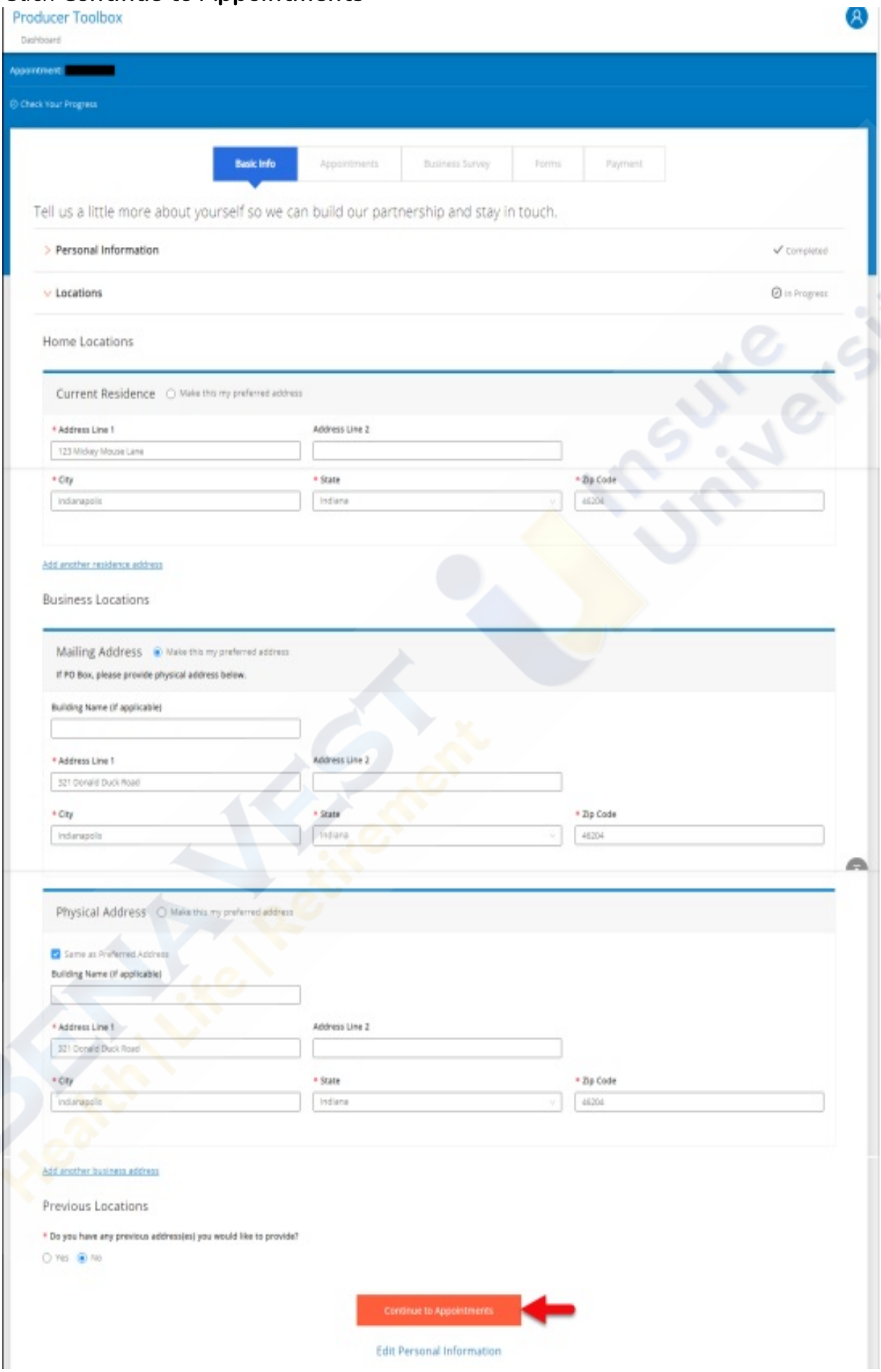
Answer the three questions:

1. **Do you speak more than one language?**
2. **I agree to access my commission statements electronically?**
   Yes = paper statements will not be mailed.
   No = paper statements will be mailed.
3. **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.



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**



Step 8: Adding Appointments

1. Select state/s.
2. Select **Individual** under the Line of Business column.
3. Select **Subagent Under An Agency**.
4. Select the **Exchange Indicator**.
5. List Benavest TIN **47-4388626** under **Agency TIN**.
6. Confirm Benavest is listed in the Agency Name section.

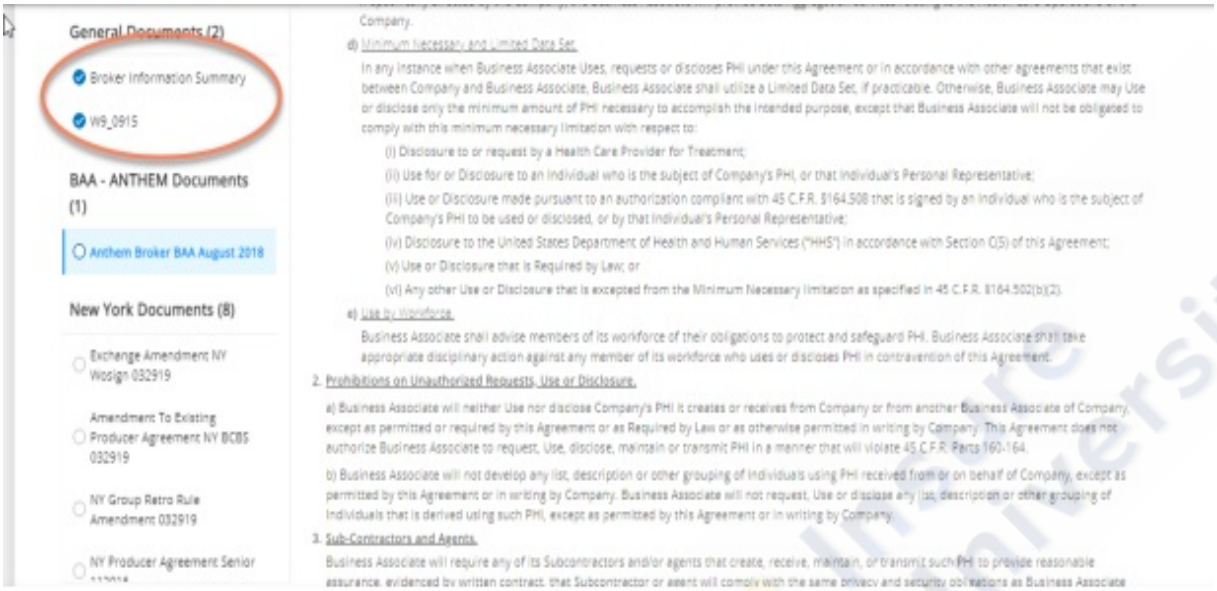
Step 9: Business Survey

Once completed, click **Continue to Questions.**
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.

Producer Toolbox
Dashboard
Appointment: [redacted] State(s): Arizona, California
Check Your Progress
Basic Info
Appointments
Business Survey
Forms
Payment
Please answer all of the following questions.
When answering "yes," Let us know any relevant details and the current status in the provided field.
You can attach documents related to each question by clicking on the upload documents link.
01. Have you ever had an insurance license, appointment, securities, registration or application denied, suspended, cancelled or revoked?
Yes No
02. Has any legal or regulatory body ever sanctioned, censured, penalized or otherwise disciplined you?
Yes No
03. Has any state or federal regulatory agency or self-regulatory authority ever filed a complaint against you?
Yes No
04. Have you ever been subjected to an insurance or investment related Consumer initiated Complaint or proceeding?
Yes No
05. Has a bonding or surety company denied, ever paid out on, or revoked a bond?
Yes No
06. Has an E&O carrier ever denied claims, paid claims, or cancelled your coverage?
Yes No
07. Have you individually, or has a company you exercised control over, filed a bankruptcy petition or been the subject of an involuntary bankruptcy petition?
Yes No
Was this for yourself?
Yes No
What year did this occur?
1993
Was this for a company?
Yes No
Please provide an explanation
Fell upon hard times and had to file for bankruptcy in 1993. see attached legal documentation clearing me of bankruptcy
Relevant Documentation
Upload Documents
08. Are there any unsatisfied judgments, garnishments, or liens against you for: Child Custody, Student Loans, IRS liens on a house?
Yes No
09. Are you in debt to any insurance company?
Yes No
10. Have you ever been indicted for, convicted of, or pled guilty or nolo contender to any felony or misdemeanor other than a minor traffic offense?
Yes No
11. Are you currently party to any litigation or the subject of any investigations?
Yes No
12. Has any employer, insurance company, or securities, broker-dealer ever terminated you employment or contract, or permitted you to resign for any other reason than lack of sales?
Yes No
Continue to Form
Back to Appointments

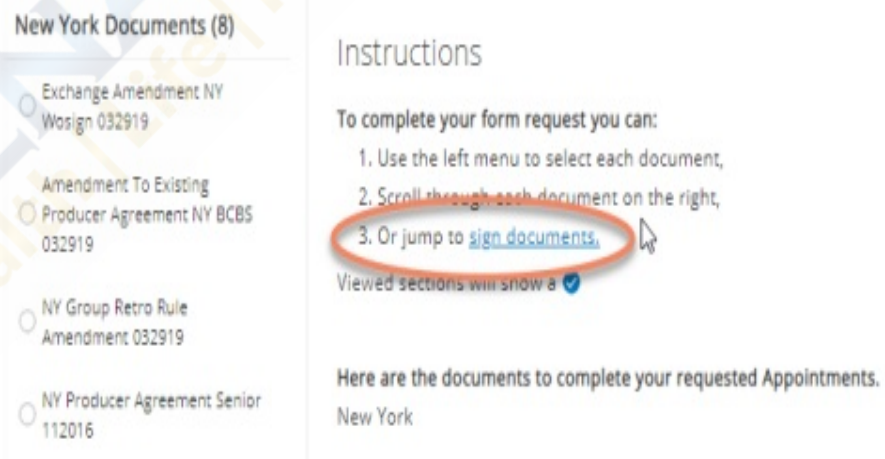
All the necessary forms you need to complete will appear down the left side of the screen. You can review all the forms by continuously scrolling down. A blue check mark will appear next to the form name as you scroll through it.



You have two options to complete the required forms:

1. You can scroll to the bottom of the forms to the '**Sign Documents**' section

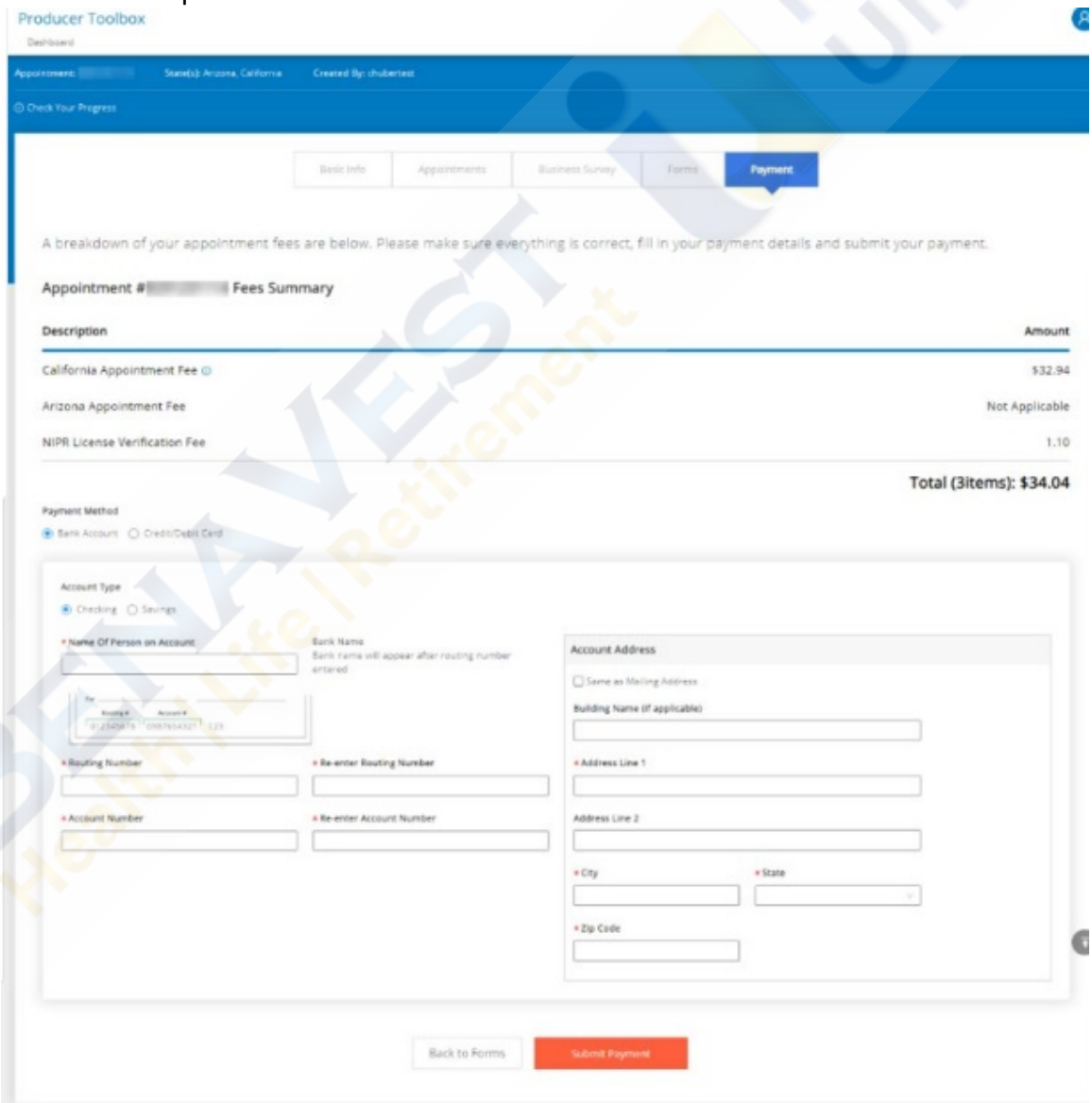
2. Click the blue hyperlink '**Sign Documents**'



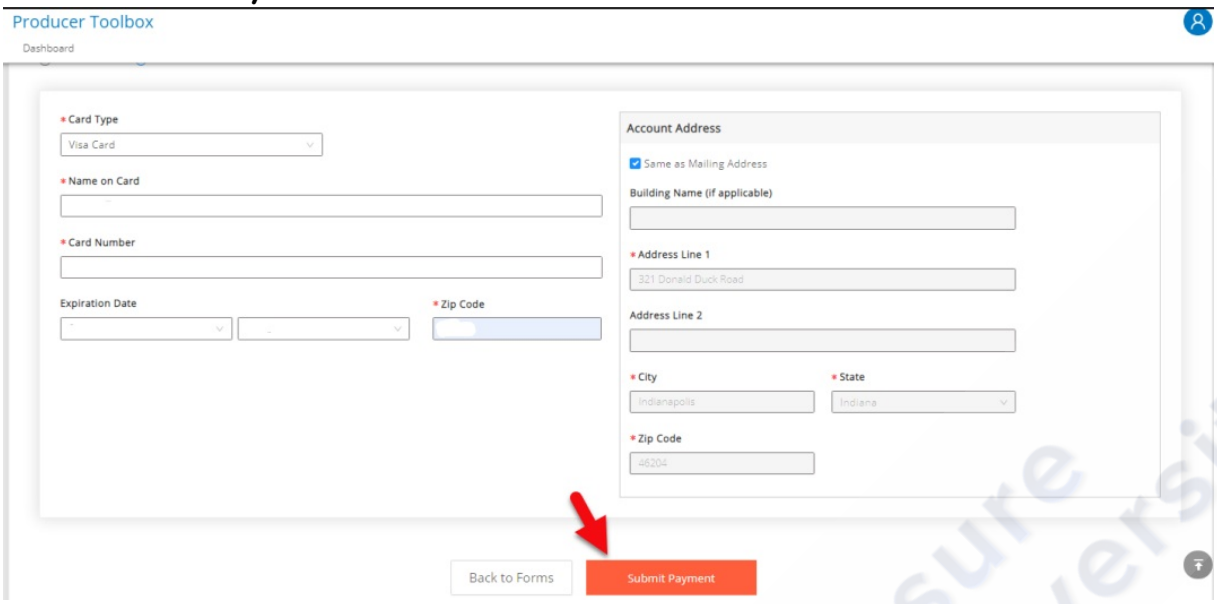
To sign and accept all forms, all that is required is to check the box next to **'I have read and accept all documentation presented'** and the system will automatically add your signature and date to all the forms.

Step 10: Payment

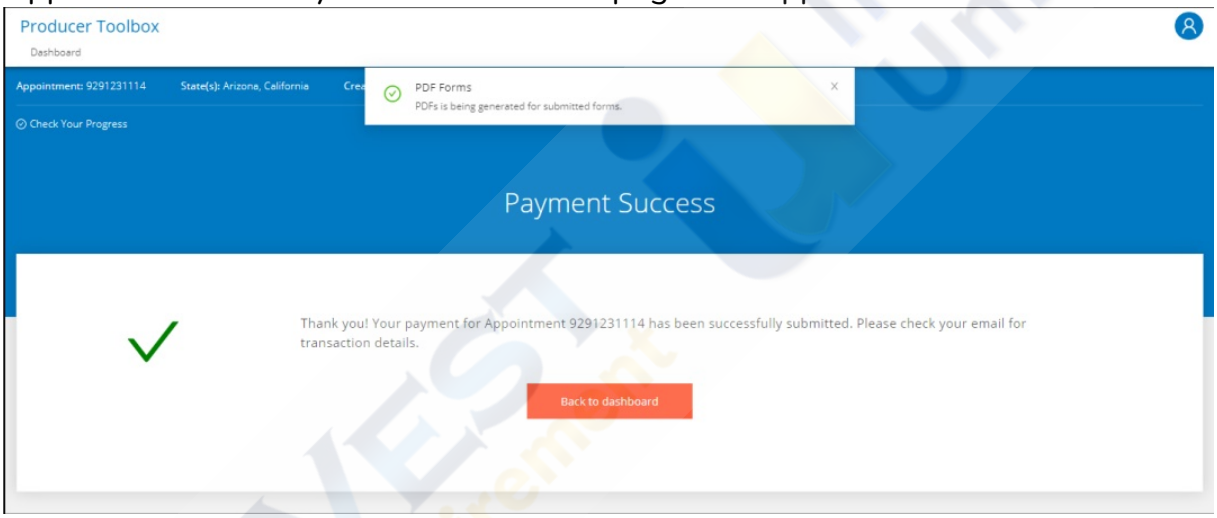
Fill in the required fields.



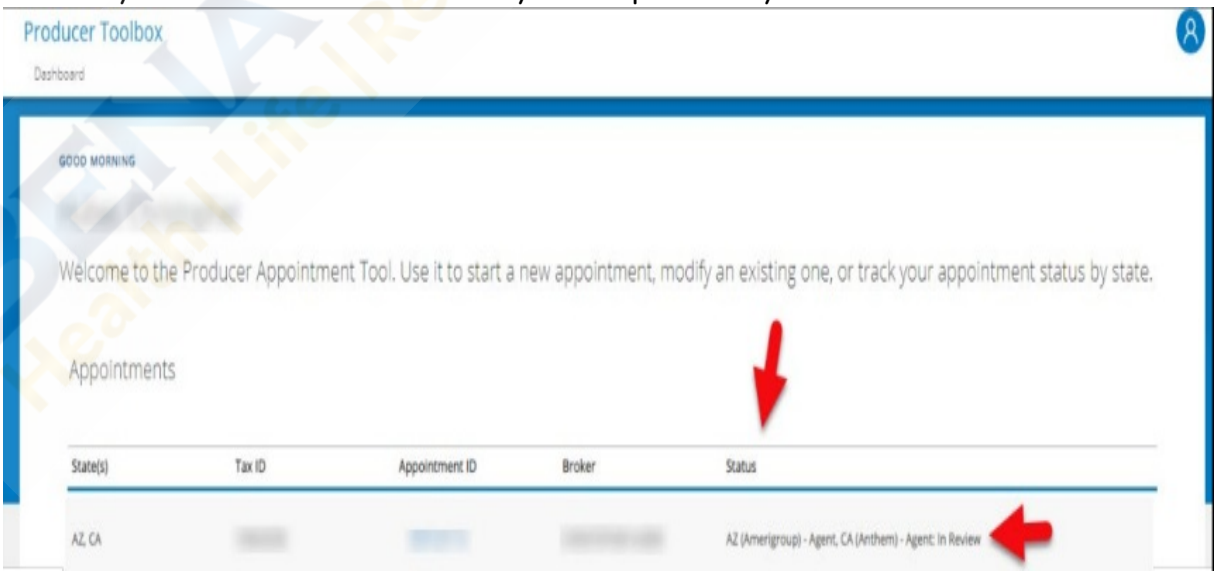
Click **Submit Payment**



Appointment and Payment confirmation page will appear.



You may then check the status of your request on your dashboard.



Transfer Instructions For Anthem

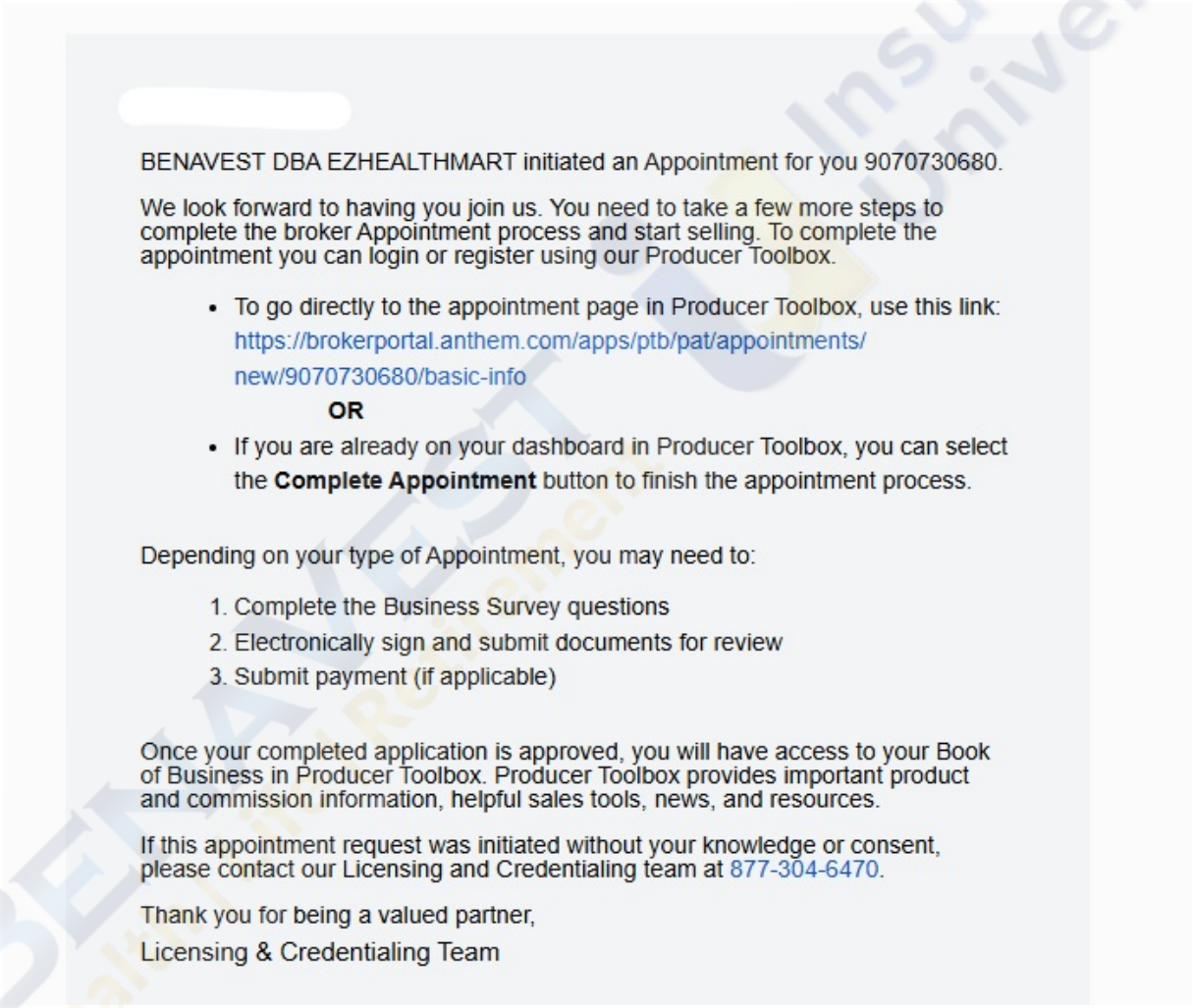
Step 1: Request Contract

Request Contract from Benavest by emailing office@benavest.com with the Subject: **Anthem ACA: Transfer Request**

Step 2: Confirmation Email

Once Benavest receives your request, you'll be sent an email where you must reply to and confirm the state appointments you want to get appointed with Anthem ACA.

From: office@benavest.com
Subject: Action Required: Your agency has asked us to appoint you



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OR

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Depending on your type of Appointment, you may need to:

1. Complete the Business Survey questions
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3. Submit payment (if applicable)

Once your completed application is approved, you will have access to your Book of Business in Producer Toolbox. Producer Toolbox provides important product and commission information, helpful sales tools, news, and resources.

If this appointment request was initiated without your knowledge or consent, please contact our Licensing and Credentialing team at 877-304-6470.

Thank you for being a valued partner,
Licensing & Credentialing Team

Step 3: Anthem Portal Log in

You will be redirected to the broker portal log in page. Log in to complete the application.

Step 4: Application

Complete the forms.

Under 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.

Producer Toolbox

Dashboard

Appointment: [redacted] State(s): Arizona, California

Check Your Progress

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

Please answer all of the following questions.

When answering "yes," Let us know any relevant details and the current status in the provided field.

You can attach documents related to each question by clicking on the upload documents link.

01. Have you ever had an insurance license, appointment, securities, registration or application denied, suspended, cancelled or revoked?

○ Yes ◉ No

02. Has any legal or regulatory body ever sanctioned, censured, penalized or otherwise disciplined you?

○ Yes ◉ No

03. Has any state or federal regulatory agency or self-regulatory authority ever filed a complaint against you?

○ Yes ◉ No

04. Have you ever been subjected to an insurance or investment related Consumer initiated Complaint or proceeding?

○ Yes ◉ No

05. Has a bonding or surety company denied, ever paid out on, or revoked a bond?

○ Yes ◉ No

06. Has an E&O carrier ever denied claims, paid claims, or cancelled your coverage?

○ Yes ◉ No

07. Have you individually, or has a company you exercised control over, filed a bankruptcy petition or been the subject of an involuntary bankruptcy petition?

◉ Yes ○ No

Was this for yourself? ◉ Yes ○ No

What year did this occur? 1993

Was this for a company?

○ Yes ◉ No

Please provide an explanation

Fell upon hard times and had to file for bankruptcy in 1993. see attached legal documentation clearing me of bankruptcy

Relevant Documentation

Upload Documents

08. Are there any unsatisfied judgments, garnishments, or liens against you for: Child Custody, Student Loans, IRS liens on a house?

○ Yes ◉ No

09. Are you in debt to any insurance company?

○ Yes ◉ No

10. Have you ever been indicted for, convicted of, or pled guilty or nolo contender to any felony or misdemeanor other than a minor traffic offense?

○ Yes ◉ No

11. Are you currently party to any litigation or the subject of any investigations?

○ Yes ◉ No

12. Has any employer, insurance company, or securities, broker-dealer ever terminated you employment or contract, or permitted you to resign for any other reason than lack of sales?

○ Yes ◉ No

Continue to Form

Back to Appointments

BENAVEST Health | Life | Retirement
Insure University

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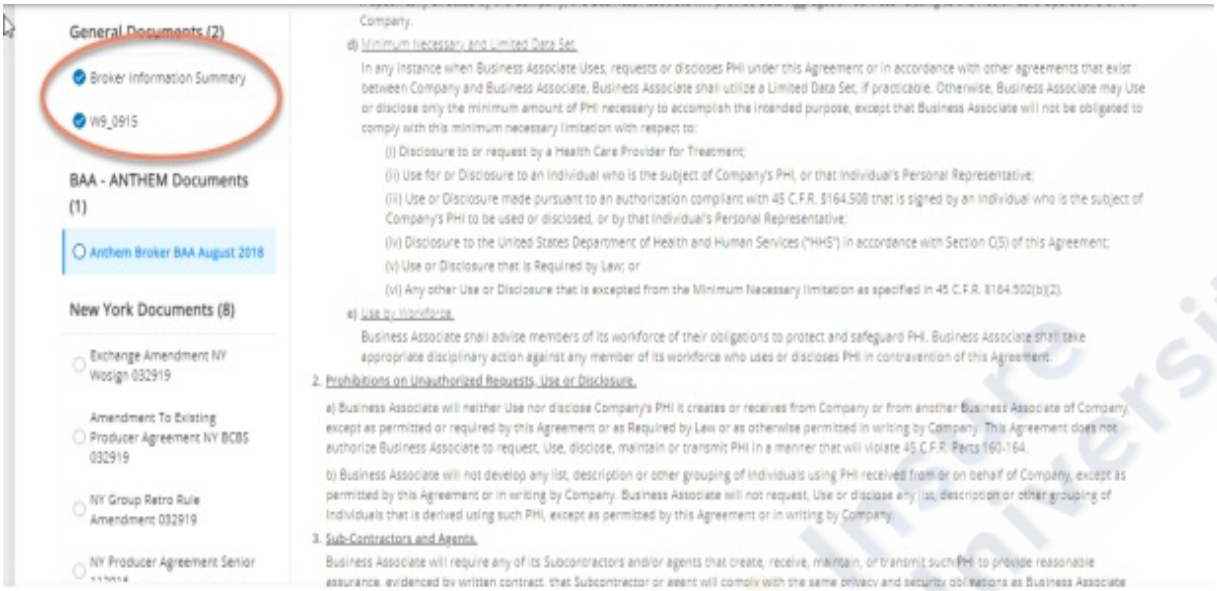

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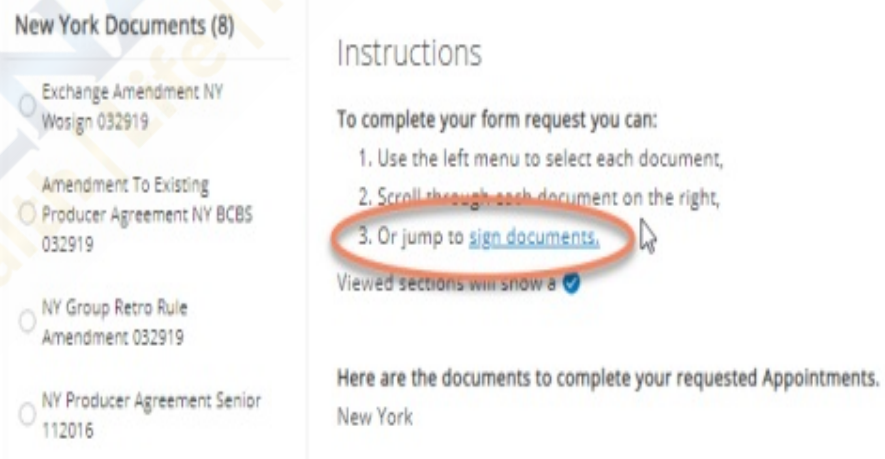

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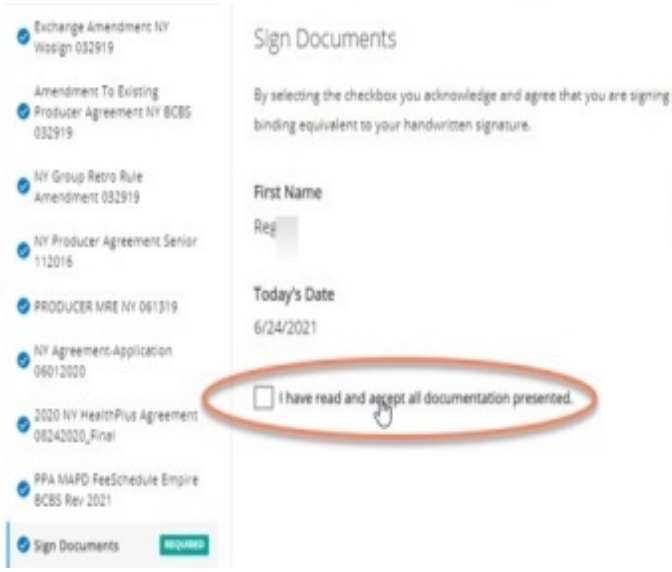
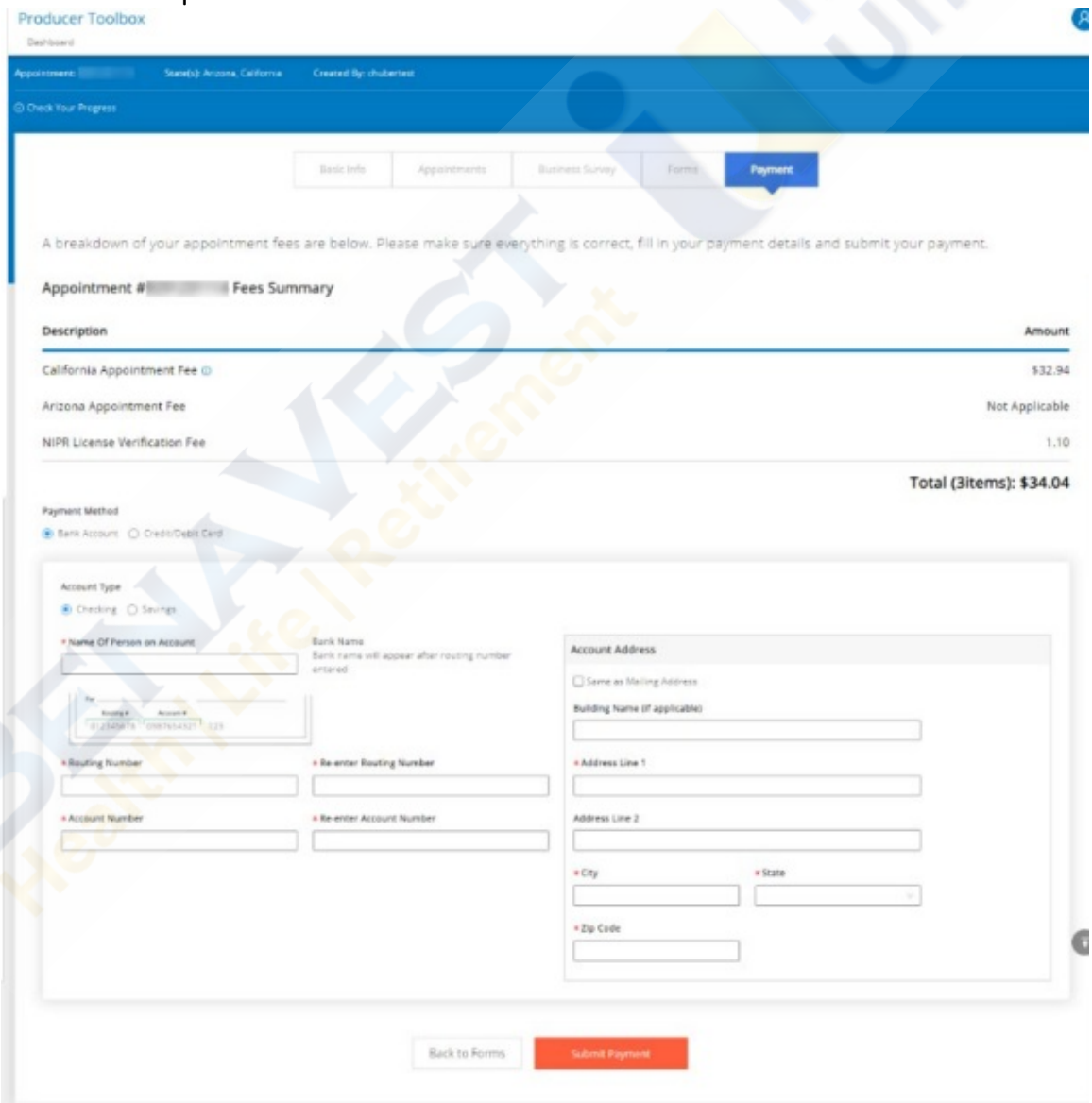
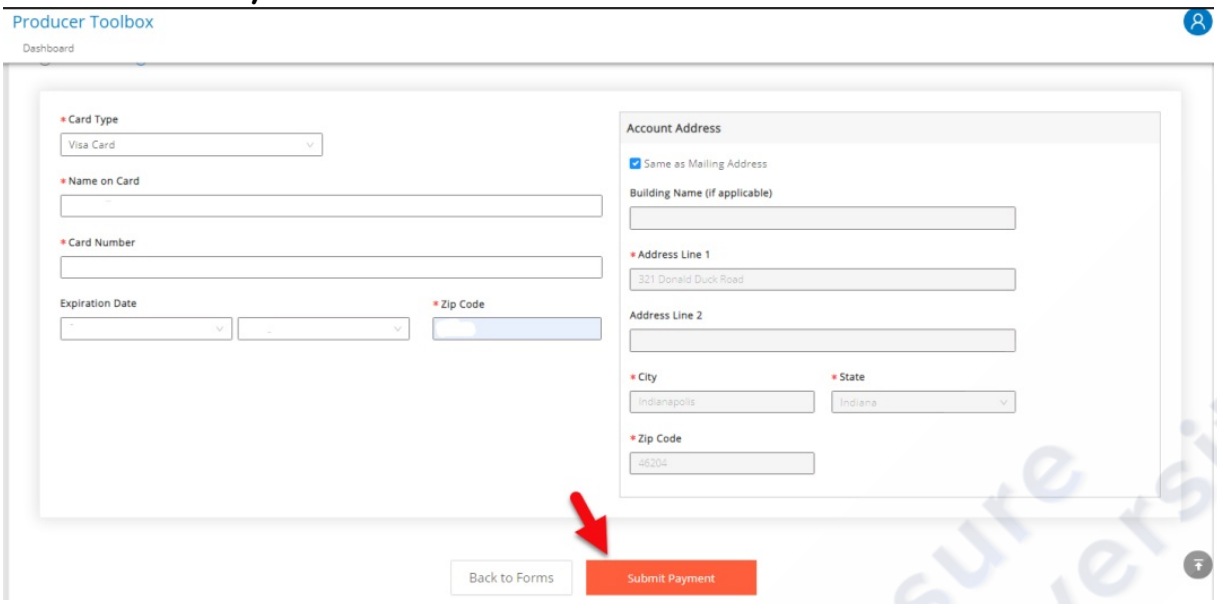


Step 5: Payment

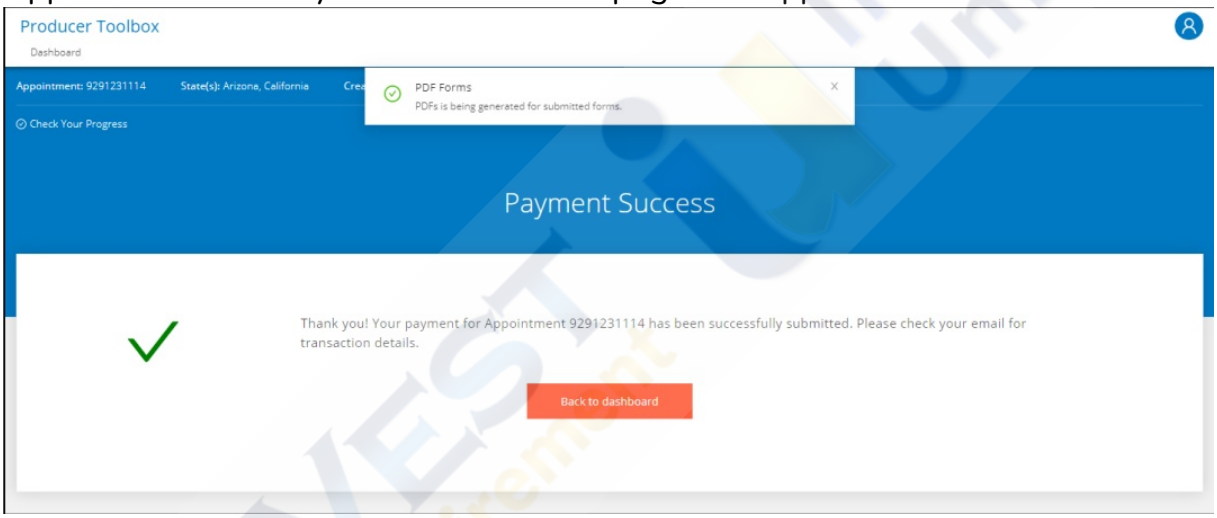
Fill in the required fields.



Click **Submit Payment**



Appointment and Payment confirmation page will appear.



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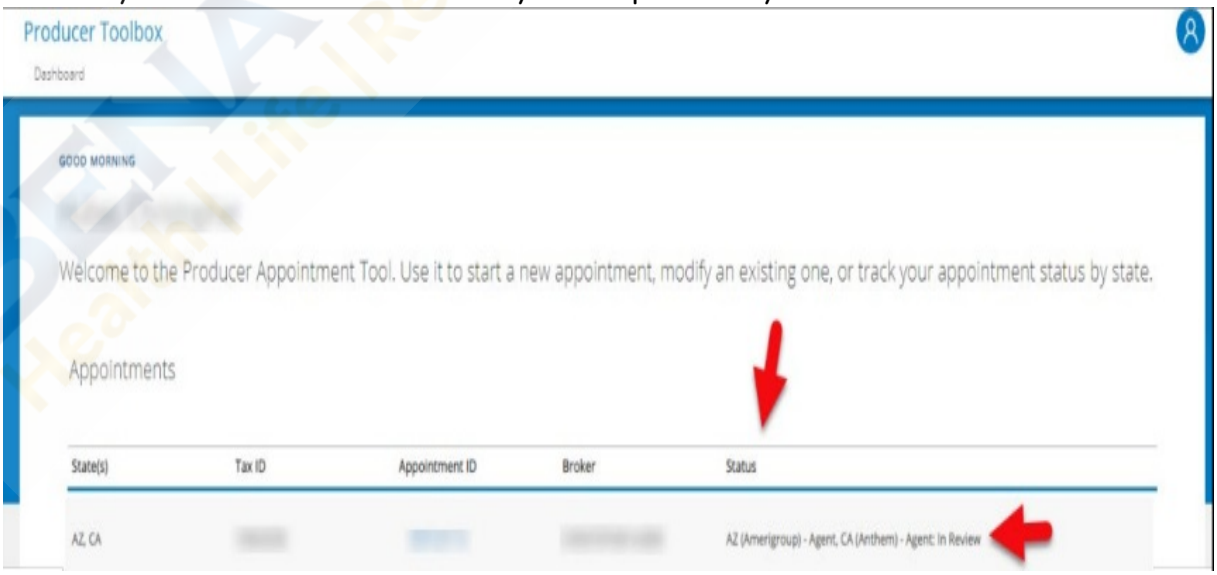

Carrier Portal

Navigate through Anthem Broker Portal (Producer Toolbox):
https://brokerportal.anthem.com/apps/ptb/login

Anthem Support Contact Details

ACA Individual Broker Services
✉ eastbrokerservices@anthem.com
✆ 866-717-8686

Licensing & Credentialing
✉ Anthem.brokers@anthem.com **or** Producers@elevancehealth.com
✆ 877-304-6470

Benavest Contact Details

✉ office@benavest.com
✆ (800) 893-7201 x 1610
✆ 🖵 (954) 947-8694