Broker Appointment Guide

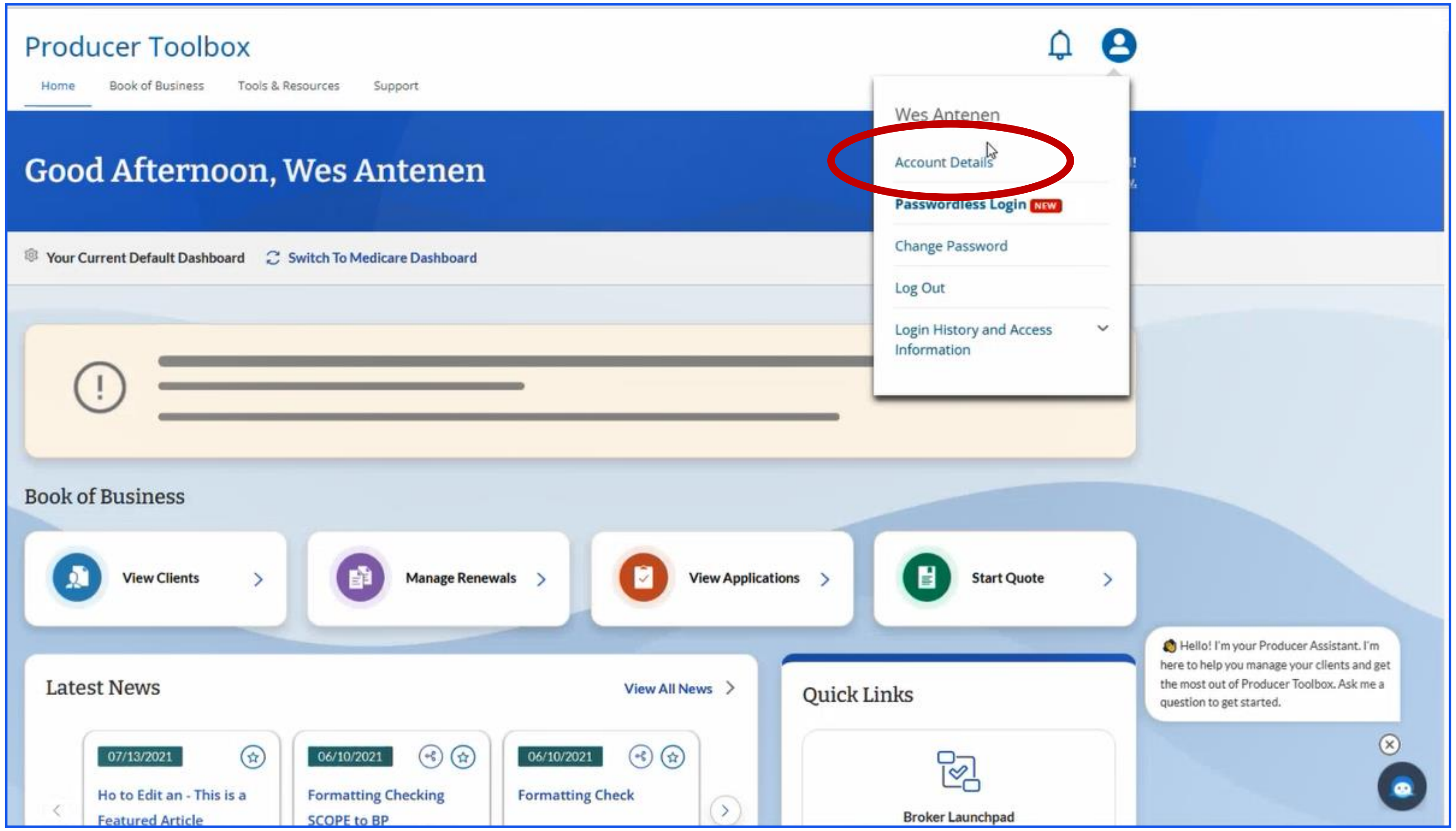
Anthem

License Retrieval Process

- To retrieve a License, work with your State and/or National Insurance Producer Registry (NIPR) https://nipr.com/ to complete the appropriate steps.

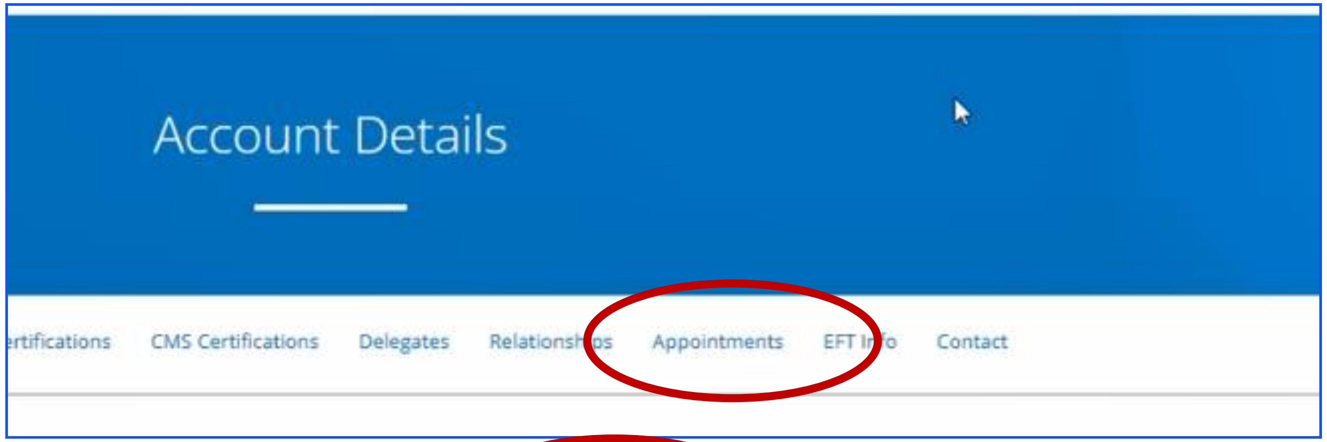
Step by step appointment process

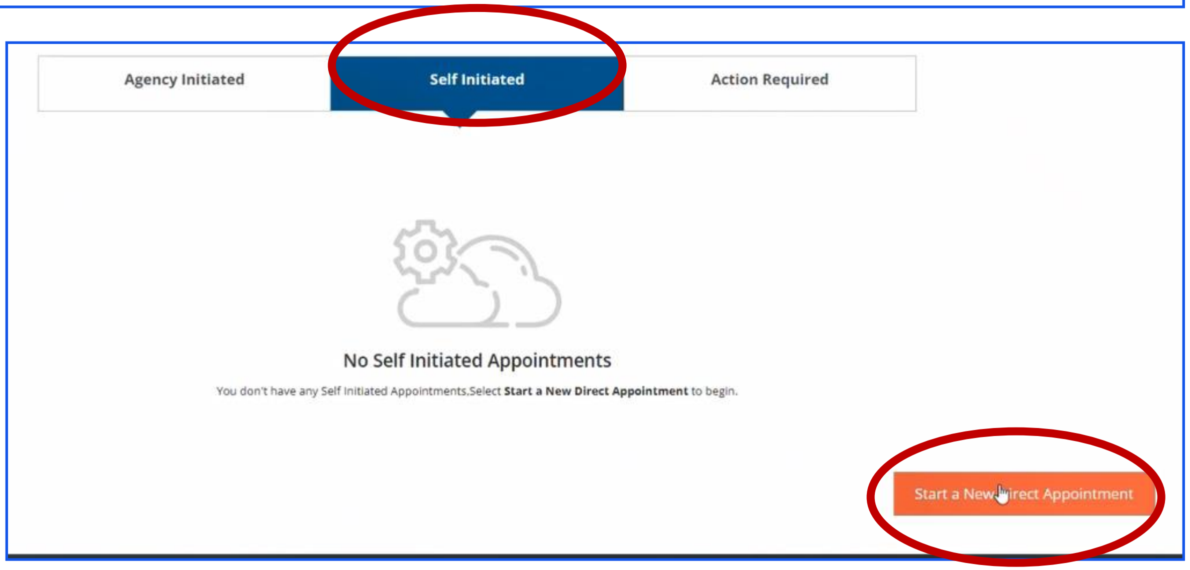
- Log into Producer Toolbox
- Click on “Account Information” –the blue and white person icon in the upper right
- Select “Account Details” in the menu that opens



Step by step appointment process

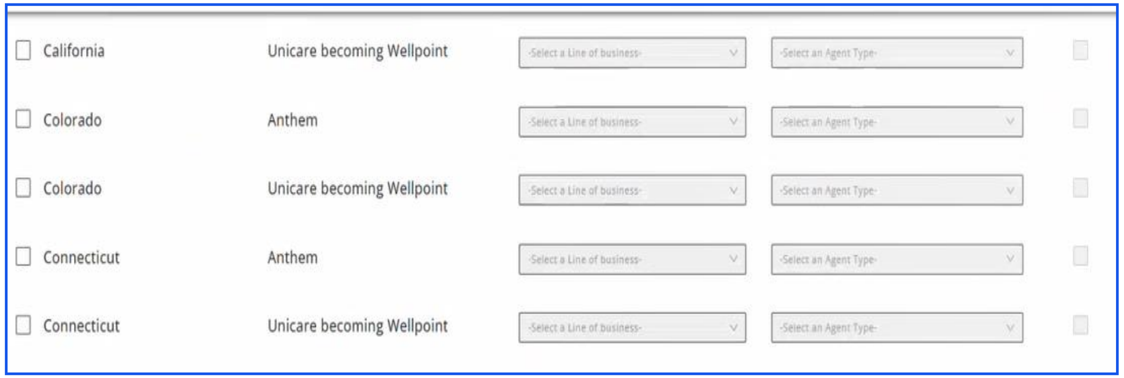
- Select "Appointments" (3rd tab from the right)
- Select "Self-initiated" from the three choices in the middle of the screen
- In the bottom right, click the orange "Start a New Direct Appointment" box





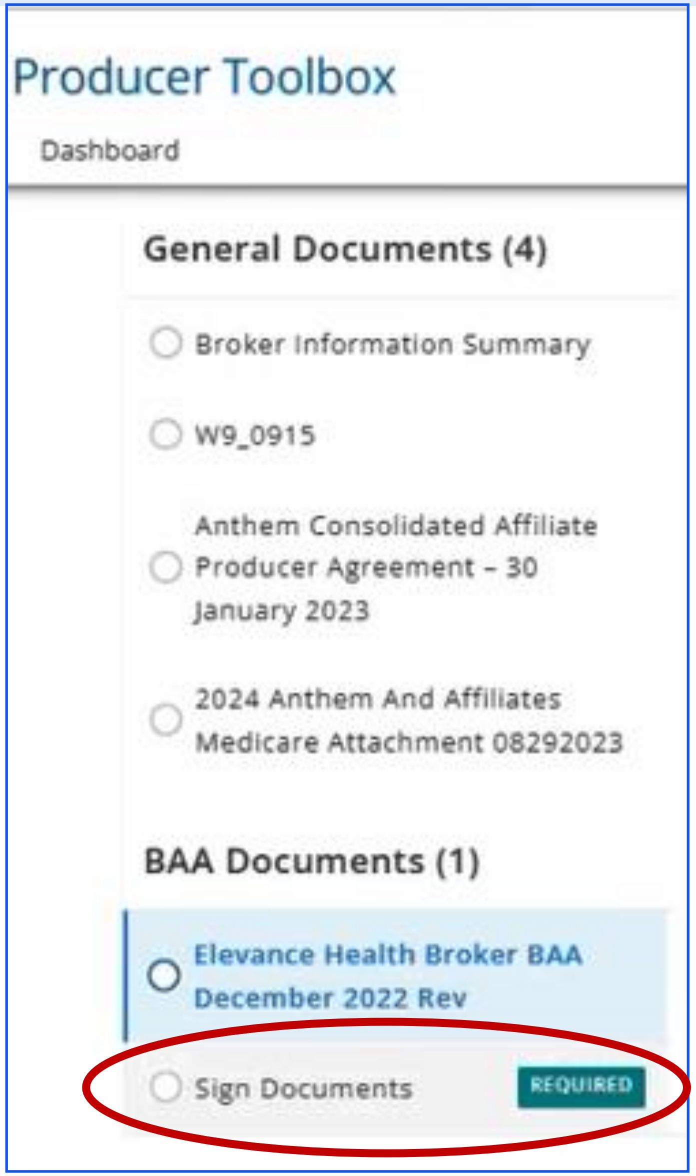
Step by step appointment process

- Expand Personal Information and confirm all data is correct
- If you are the Principal of the agency, please ensure the radio button is populated for “Yes” for the question “Are you the Principal of an Agency or General Agency?”
- Add the agency after you confirm locations
- After verifying your information, click the orange “Continue to appointments” box at the bottom
- Scroll down and select the state in which you want to be appointed.
- After selecting your state, select your lines of business. You’ll select them and click “Add.”
- Select either “Direct Independent Agent” or “Subagent under an Agency”
- If you are a sub-agent, you’ll be prompted to enter the agency TIN
- If you are the Principal of an agency, you’ll see a third option that says “Agency” with the name of the agency, Select this option.



Step by step appointment process

- At the bottom left, select the appropriate tax classification, and then click the orange "Continue to Questions" box
- Answer the "Business Survey" questions and then click the orange "Continue to Forms" box
- On the left side, click the "Sign Documents" box. You can then review and sign all documentation with one click by checking the "I have read and accept all documentation presented" box at the bottom.
- Click the orange "Continue to Payment" box.



Step by step appointment process

- **Enter your payment information and click the orange "Submit Payment" box at the bottom**

- **You should get a success message, and it will take 3-5 days for the appointment to process.**

- **To check the status of the appointment at any time:**

- Click on the profile icon in the upper right and select "Account Details" from the menu

- Click on "Appointments"

- Click on "Self-Initiated"

- You'll see your current appointment information, and the message in the "Status" section on the right will show any updates.

If you have questions or have any issues with this process, please call 1-877-304-6470 or email producers@elevancehealth.com