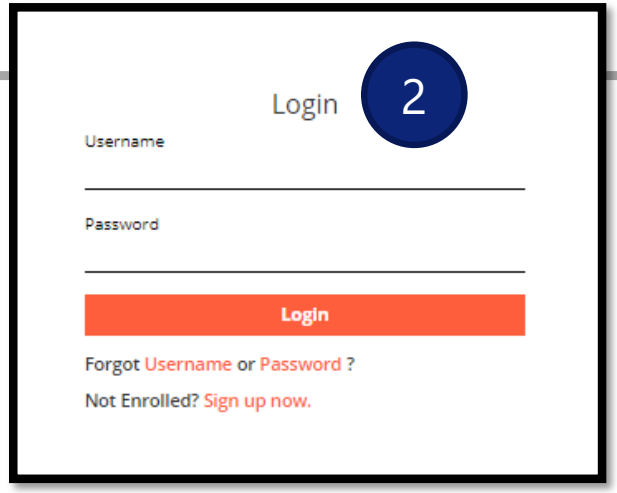
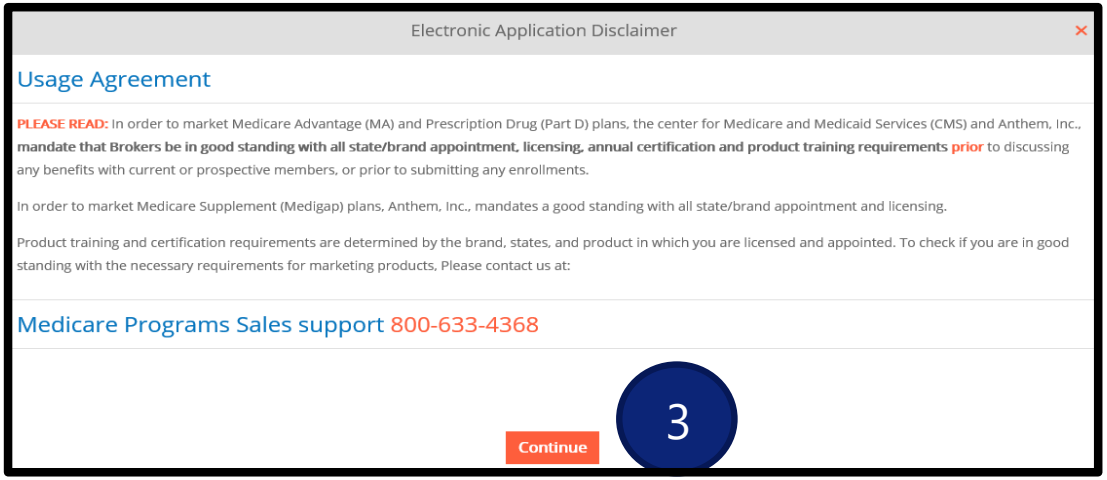
Anthem Online and Telephonic Enrollment

Y0114_19_106969_I_C 04/12/2019

Access mProducer Directly

1. Navigate to mProducer at mproducer.anthem.com.
2. Enter your username and password and click **Login**. *
3. Click **Continue**.

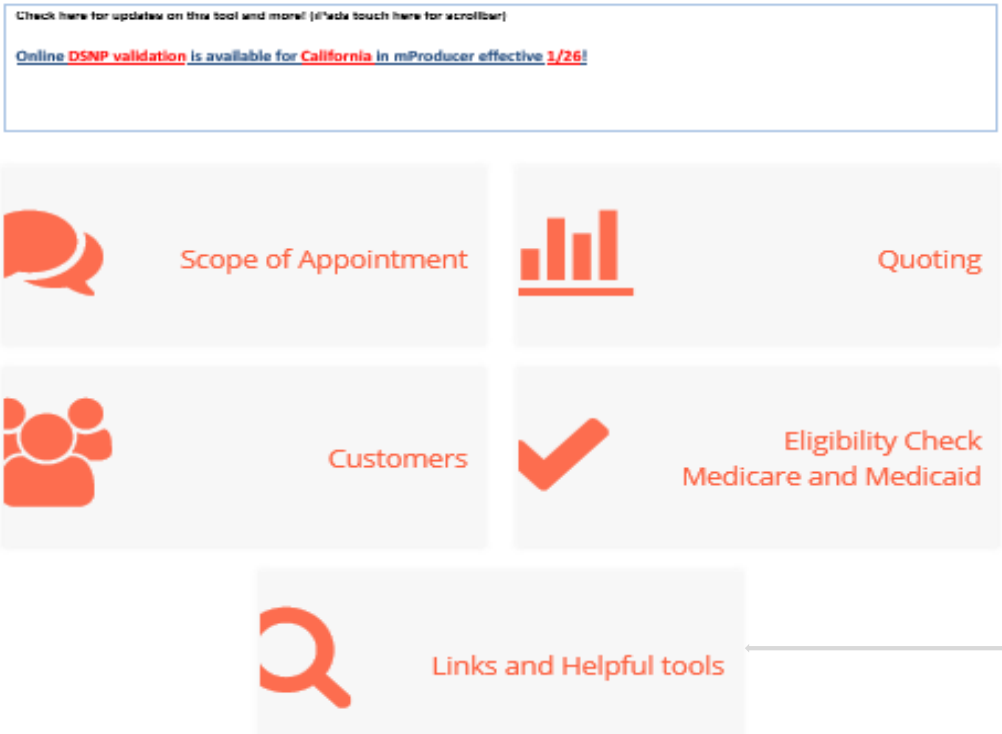




* If you have not signed up, click **Sign up now**. You will be navigated back to PTB to register.

mProducer Home Page

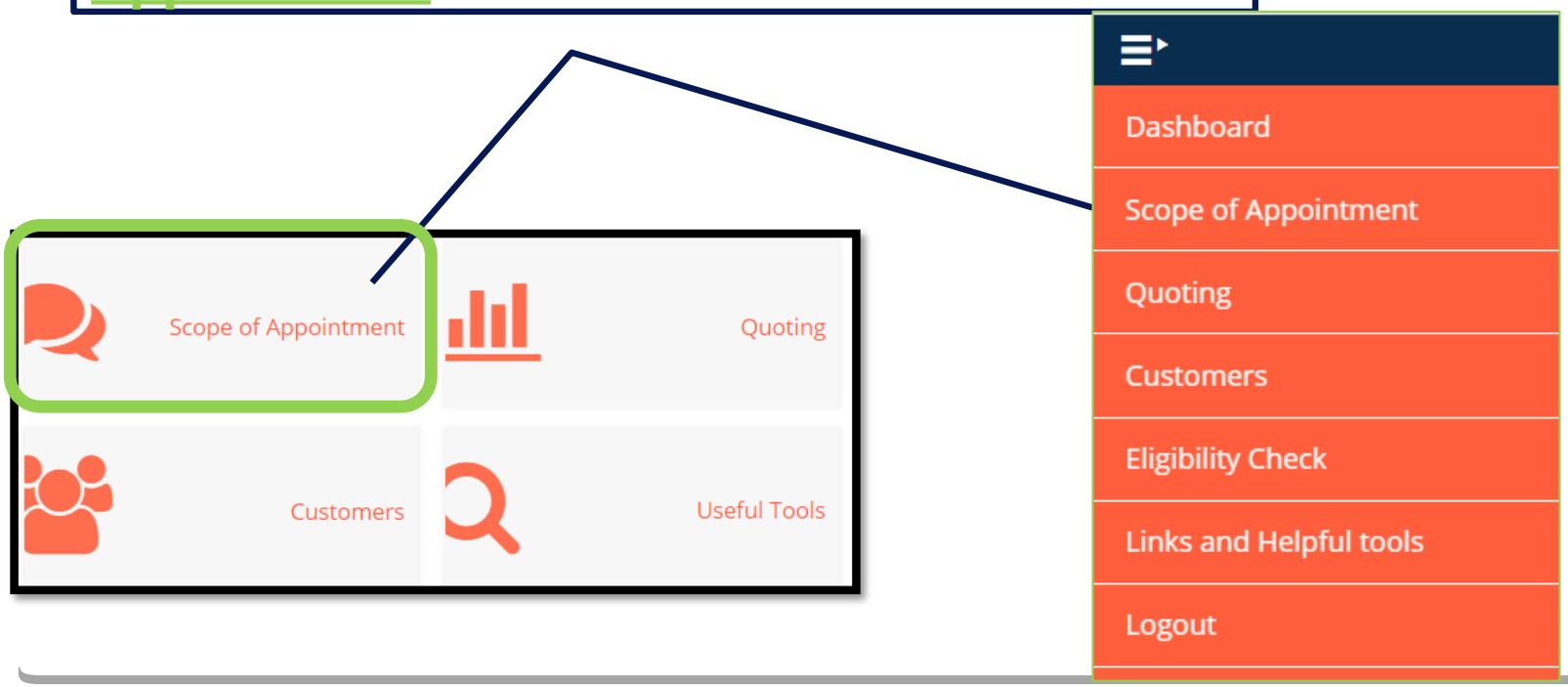
Stay informed by reading our broadcast messages!



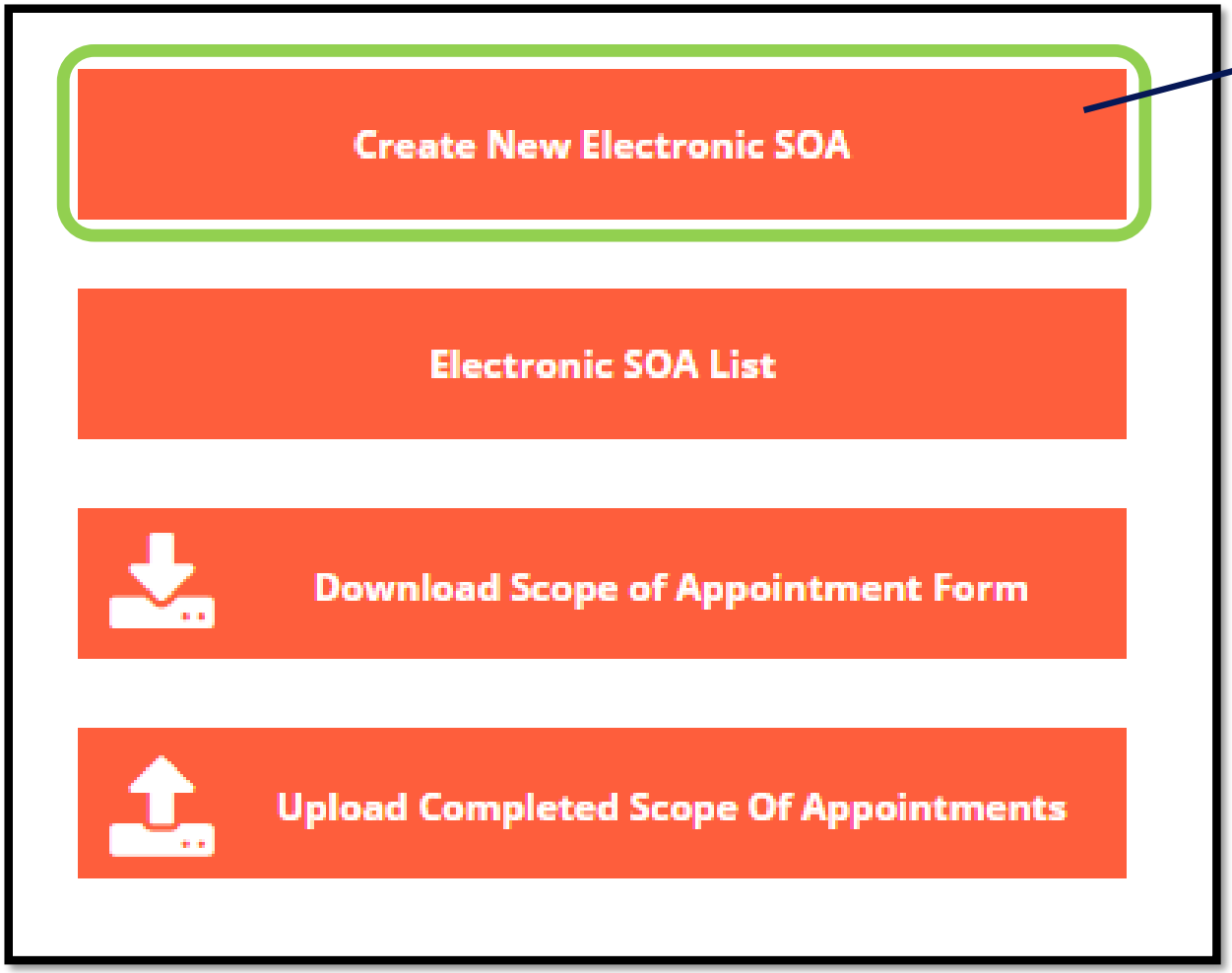
You can perform various tasks by clicking on the appropriate home page tile.

Scope of Appointment

From the Home page, click on the **Scope of Appointment** tile. From any page, you can click the ***Menu*** icon and select **Scope of Appointment**.



Create New SOA

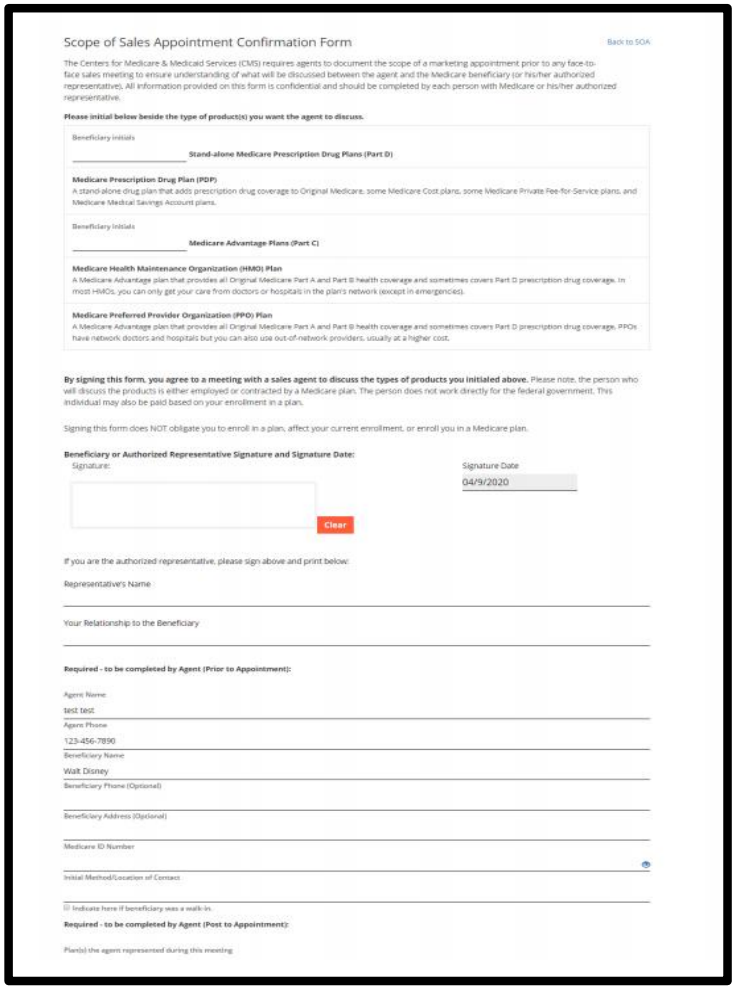


To create a new SOA, click the **Create New Electronic SOA** button.

Electronic Scope of Appointment

Leave beneficiary section empty; the beneficiary completes upon transfer

Agent section must be completed prior to transfer of Scope



Scope of Sales Appointment Confirmation Form

Back to SOA

The Centers for Medicare & Medicaid Services (CMS) requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or his/her authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product(s) you want the agent to discuss.

Beneficiary initials

_____ **Stand-alone Medicare Prescription Drug Plans (Part D)**

Medicare Prescription Drug Plan (PDP)
A stand-alone drug plan that adds prescription drug coverage to Original Medicare, some Medicare Cost plans, some Medicare Private Fee-for-Service plans, and Medicare Medical Savings Account plans.

Beneficiary initials

_____ **Medicare Advantage Plans (Part C)**

Medicare Health Maintenance Organization (HMO) Plan
A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you can only get your care from doctors or hospitals in the plan's network (except in emergencies).

Medicare Preferred Provider Organization (PPO) Plan
A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals but you can also use out-of-network providers, usually at a higher cost.

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. The person does not work directly for the federal government. This individual may also be paid based on your enrollment in a plan.

Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

Beneficiary or Authorized Representative Signature and Signature Date:

Signature:

Clear

Signature Date
04/9/2020

If you are the authorized representative, please sign above and print below:

Representative's Name

Your Relationship to the Beneficiary

Required - to be completed by Agent (Prior to Appointment):

Agent Name
test test

Agent Phone
123-456-7890

Beneficiary Name
Walt Disney

Beneficiary Phone (Optional)

Beneficiary Address (Optional)

Medicare ID Number

Initial Method/Location of Contact

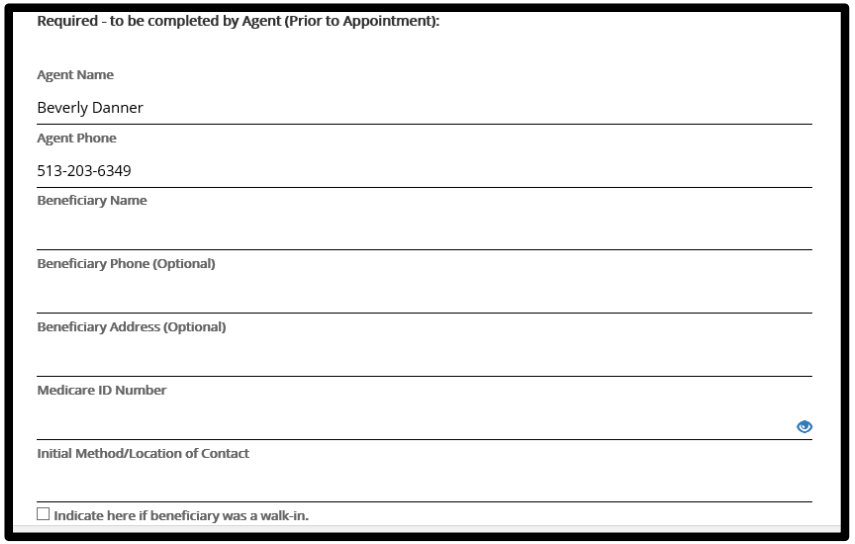
Indicate here if beneficiary was a walk-in.

Required - to be completed by Agent (Post to Appointment):

Plan(s) the agent represented during this meeting

eSOA Required Agent Information

Scroll down, complete the section “Required – to be completed by Agent” prior to transfer (minimum information required: Agent Name, Agent Phone, Beneficiary Name) Agent name and phone number will pre-populate.



eSOA Transfer to Client

Scope of Appointment documentation is subject to CMS record retention requirements.

Agent: Ensure correct Scope of Appointment form is selected for beneficiary's plan enrollment choice. Also, if the form was signed by the beneficiary at the time of appointment, please provide explanation why SOA was not documented prior to meeting:

Anthem-affiliated health plans are Medicare Advantage Organizations and Prescription Drug Plans with a Medicare contract. For Dual-Eligible Special Needs Plans: Anthem-affiliated health plans are a D-SNP with a Medicare contract and a contract with the state Medicaid program. Enrollment in Anthem-affiliated health plans depends on contract renewal.
A Medicare-approved Part D sponsor.

Save Initiated SOA | Transfer to Bene to eSign

eSOA Transfer to Beneficiary

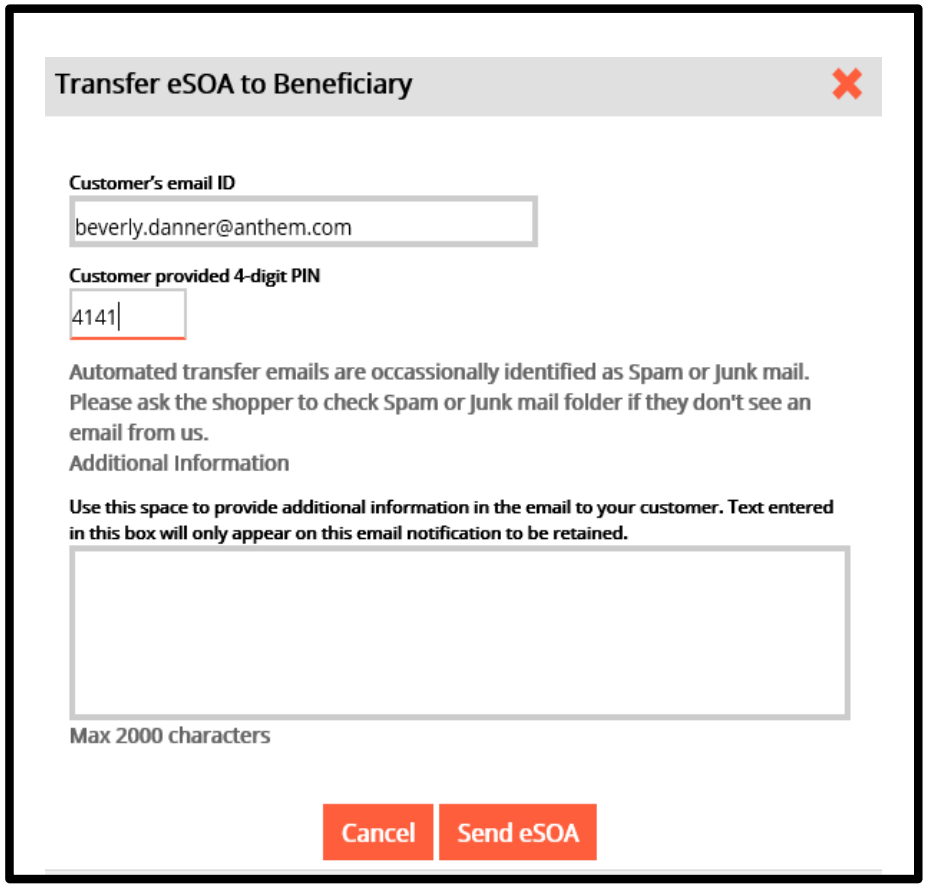
A pop up box with “Transfer eSOA to Beneficiary” will display

Enter beneficiary’s email ID

Enter beneficiary provided 4 digit PIN (you or your client will make up the random PIN

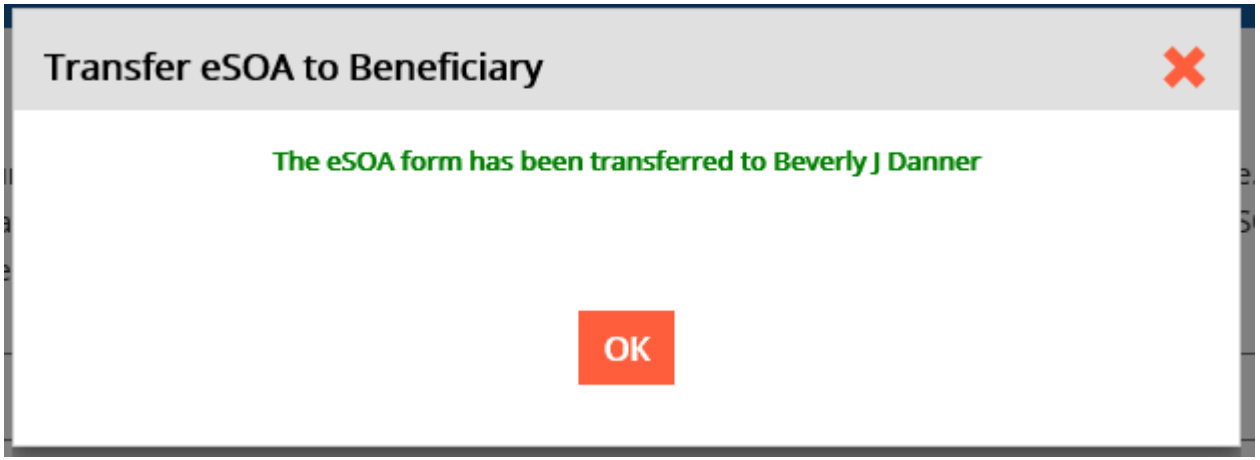
Enter message (optional)

Click “Send eSOA”

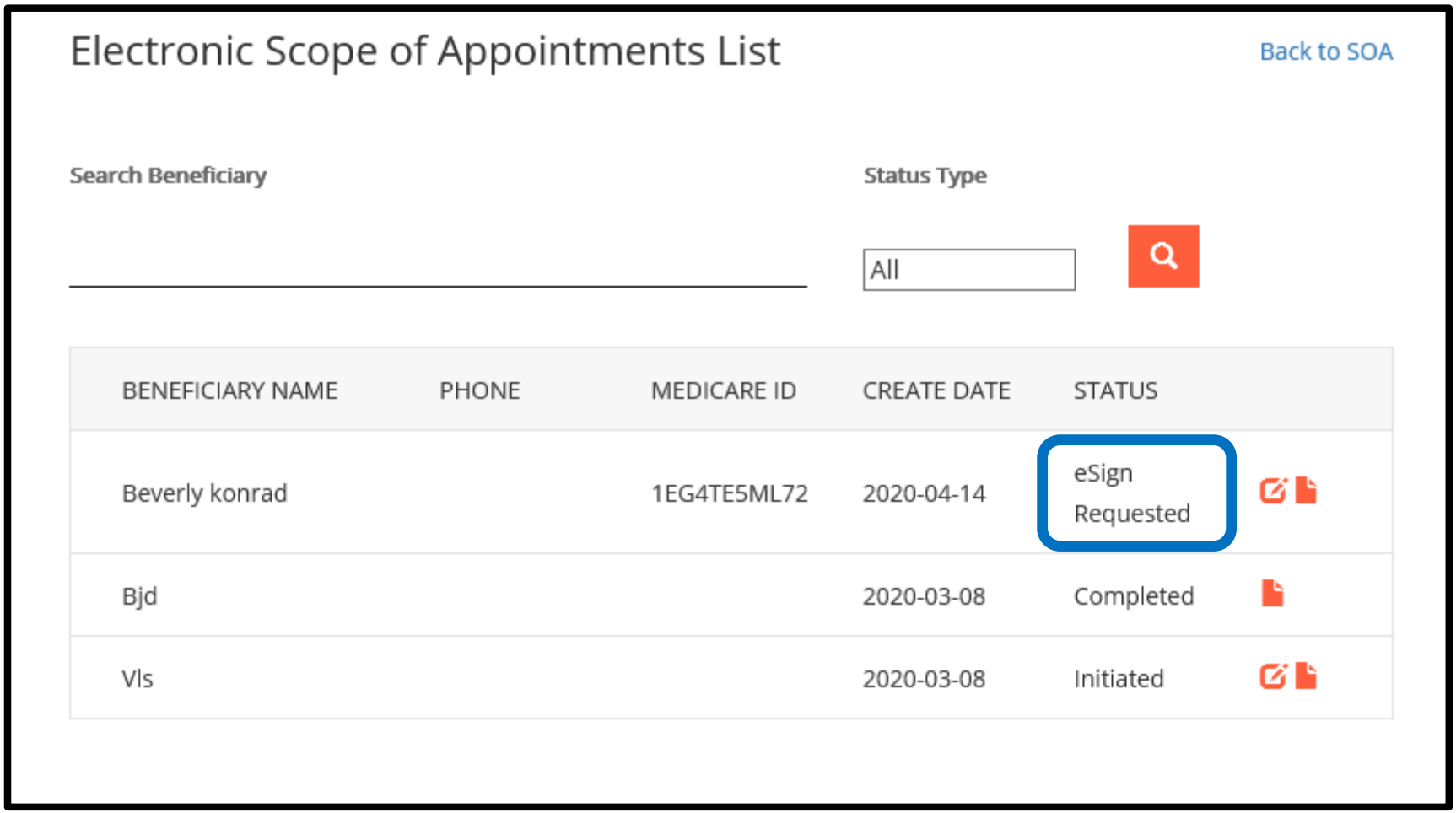


eSOA Transfer to Beneficiary

Upon “Transfer to Bene to eSign”, you will receive a confirmation pop up that eSOA was transferred



eSOA Electronic Scope of Appointments List



eSOA Client Signature

Beneficiary will receive an email from Anthem. Beneficiary will click on the link to open

Your agent, Beverly Danner, has started an electronic scope of appointment for you.

Notice from agent: [No message to display]

To access your scope of appointment, please click on the following link https://shop.anthem.com/medicare/my-esoa/enterpin?esoa-pin=1094

To view the scope of appointment, please use the link provided above. You will need to enter the Email address and the 4 digit PIN you provided to the agent.

Customer Information

Name: Beverly Konrad

Email Address: beverly.danner@anthem.com

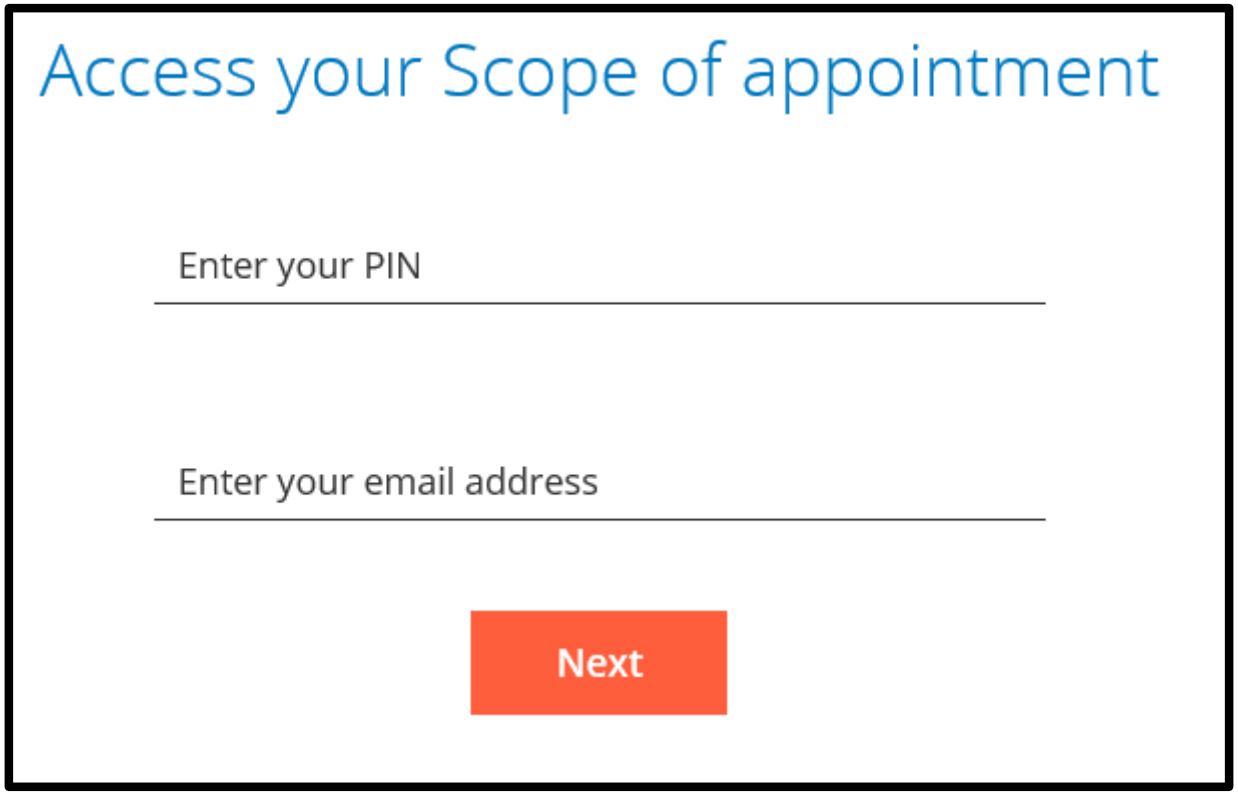
PIN: 4 digit pin you provided to the agent.

We look forward to the opportunity to service your health coverage needs.

Beverly Danner

eSOA Beneficiary Signature

"Access your Scope of Appointment" box will appear, beneficiary will enter email address and 4 digit pin

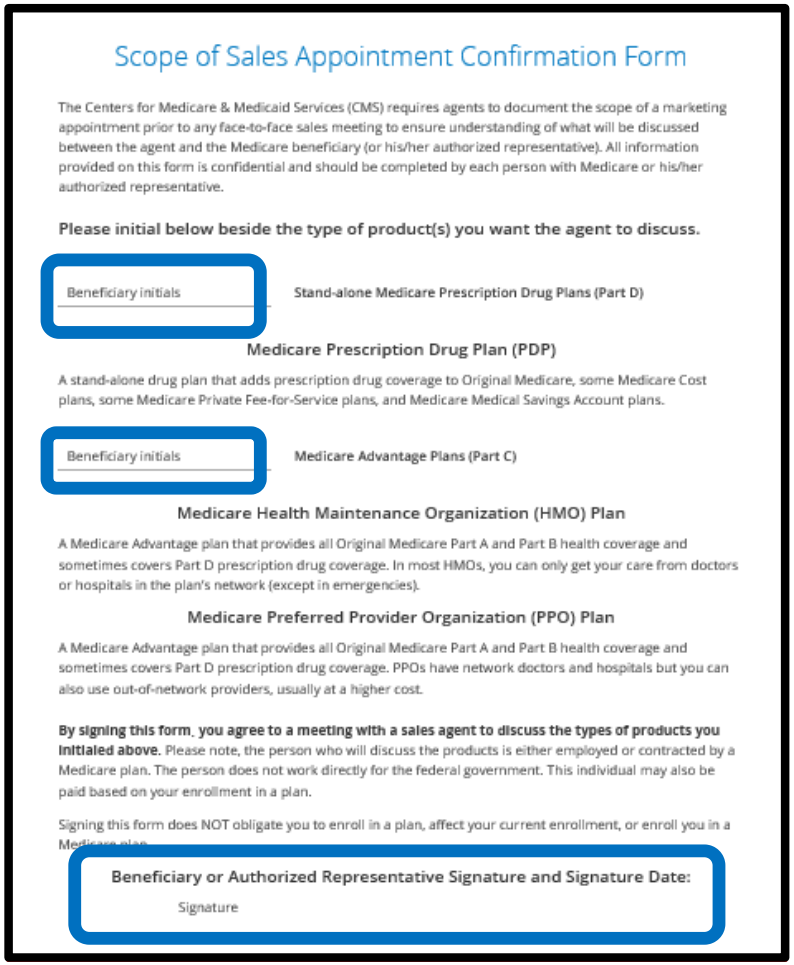


eSOA Beneficiary Section

Beneficiary completes the "beneficiary section" of the SOA

The beneficiary should tap into the field for the desired products they want to discuss and enter their initials

Beneficiary signs and dates the Scope



Scope of Sales Appointment Confirmation Form

The Centers for Medicare & Medicaid Services (CMS) requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or his/her authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product(s) you want the agent to discuss.

Beneficiary initials _____ **Stand-alone Medicare Prescription Drug Plans (Part D)**

Medicare Prescription Drug Plan (PDP)

A stand-alone drug plan that adds prescription drug coverage to Original Medicare, some Medicare Cost plans, some Medicare Private Fee-for-Service plans, and Medicare Medical Savings Account plans.

Beneficiary initials _____ **Medicare Advantage Plans (Part C)**

Medicare Health Maintenance Organization (HMO) Plan

A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you can only get your care from doctors or hospitals in the plan's network (except in emergencies).

Medicare Preferred Provider Organization (PPO) Plan

A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals but you can also use out-of-network providers, usually at a higher cost.

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. The person does not work directly for the federal government. This individual may also be paid based on your enrollment in a plan.

Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

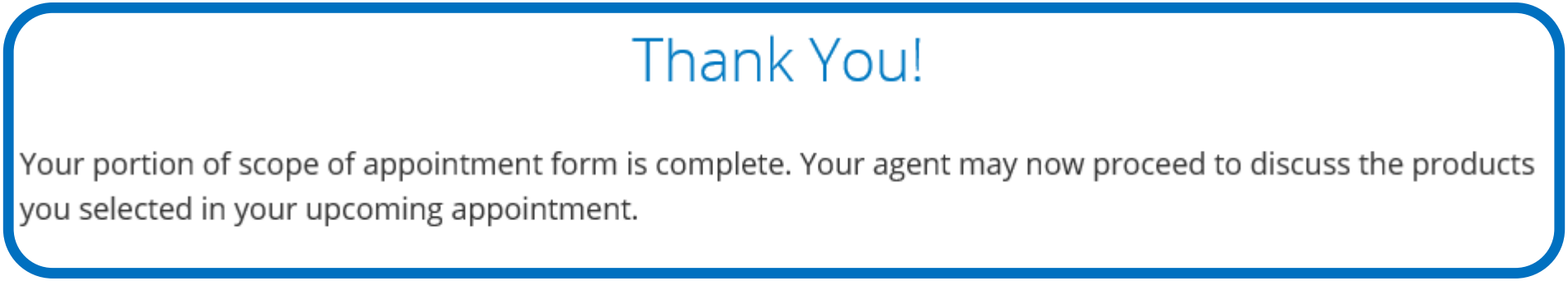
Beneficiary or Authorized Representative Signature and Signature Date:

Signature

eSOA Submit & Transfer Back to Agent

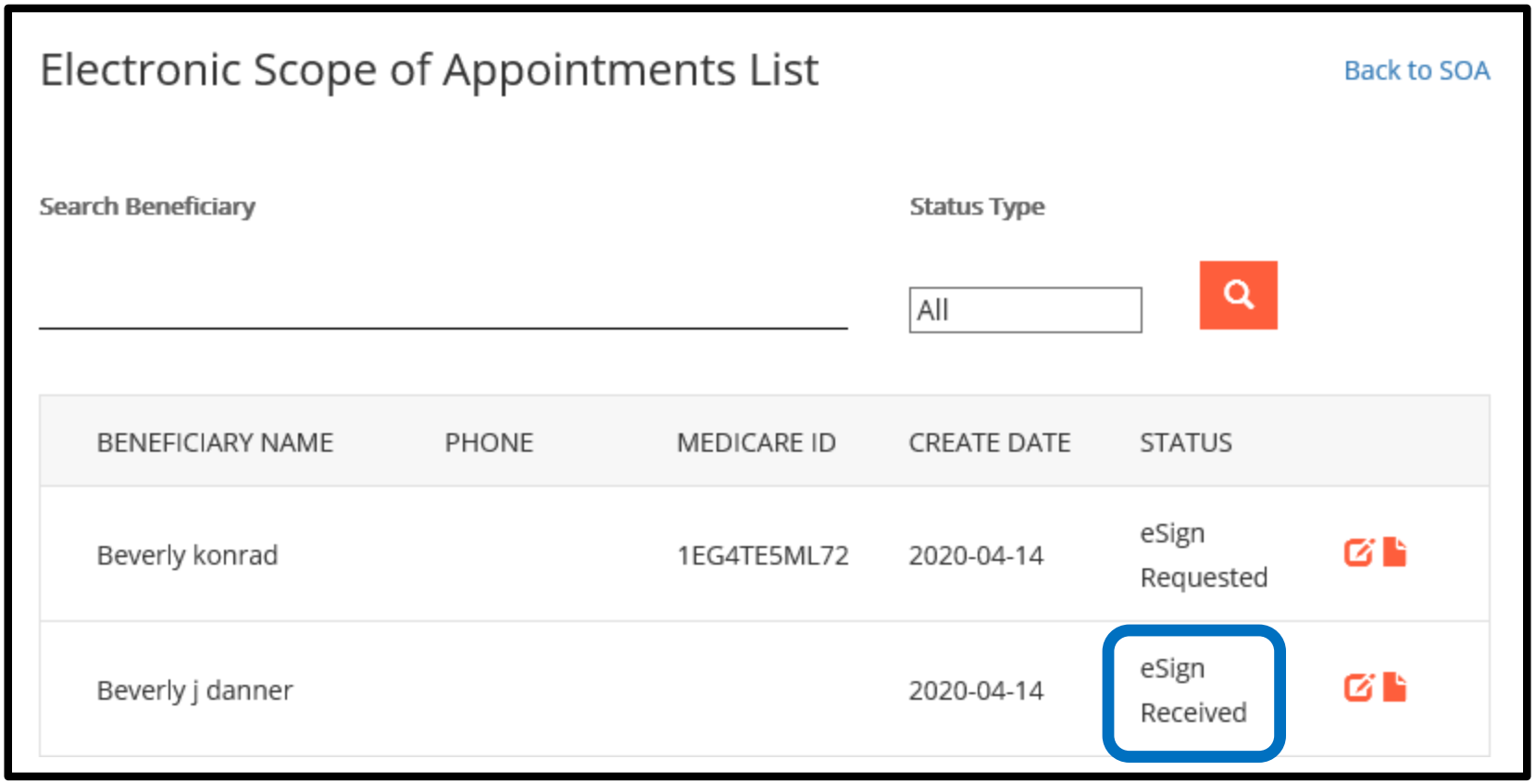
Beneficiary will click Submit and Transfer Back to Agent at the bottom of the form

Beneficiary will get a “Thank You!” screen and can close window



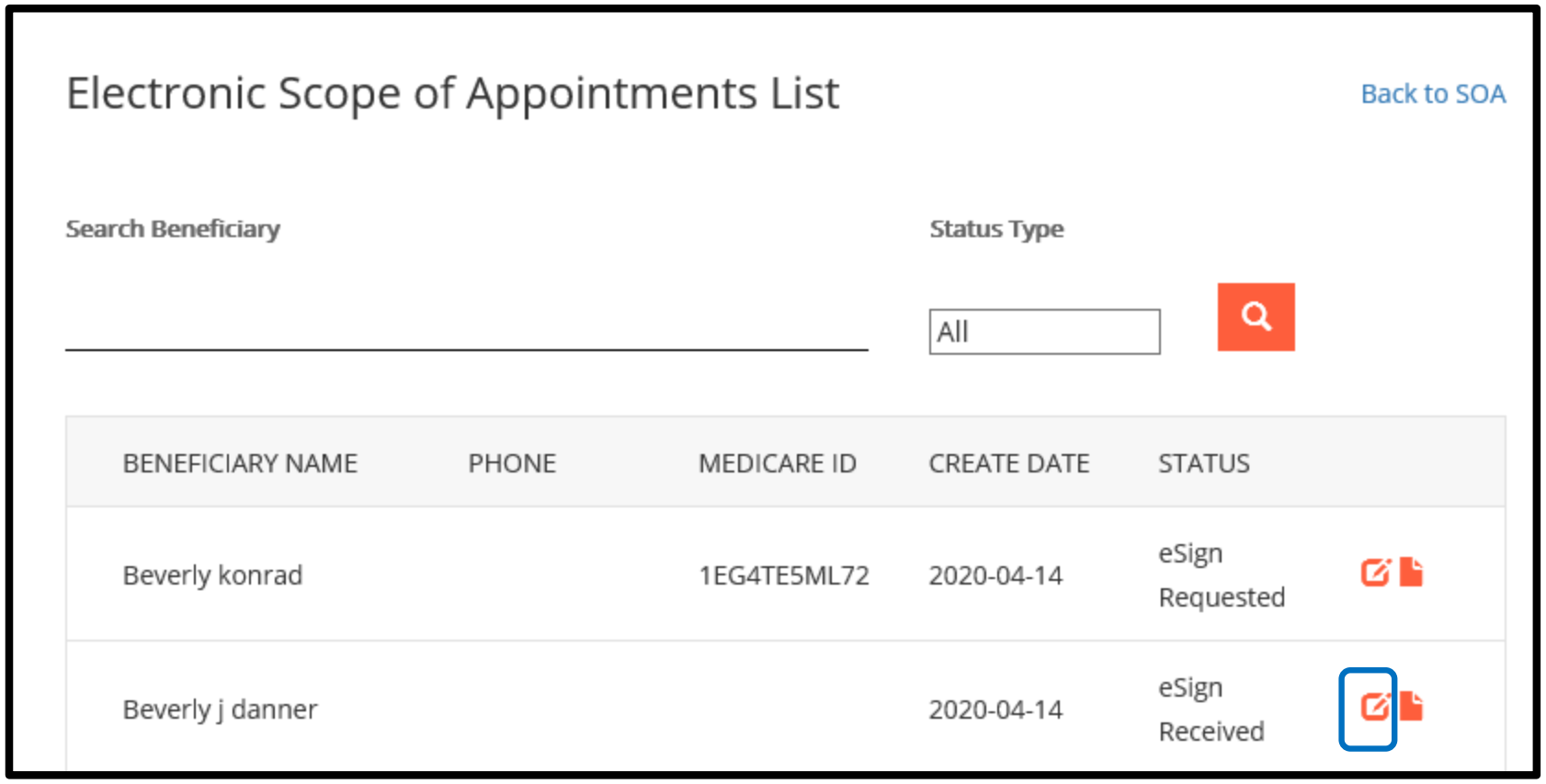
Electronic Scope of Appointments List

Once the beneficiary signs, the Electronic Scope of Appointments List will display "eSign Received"



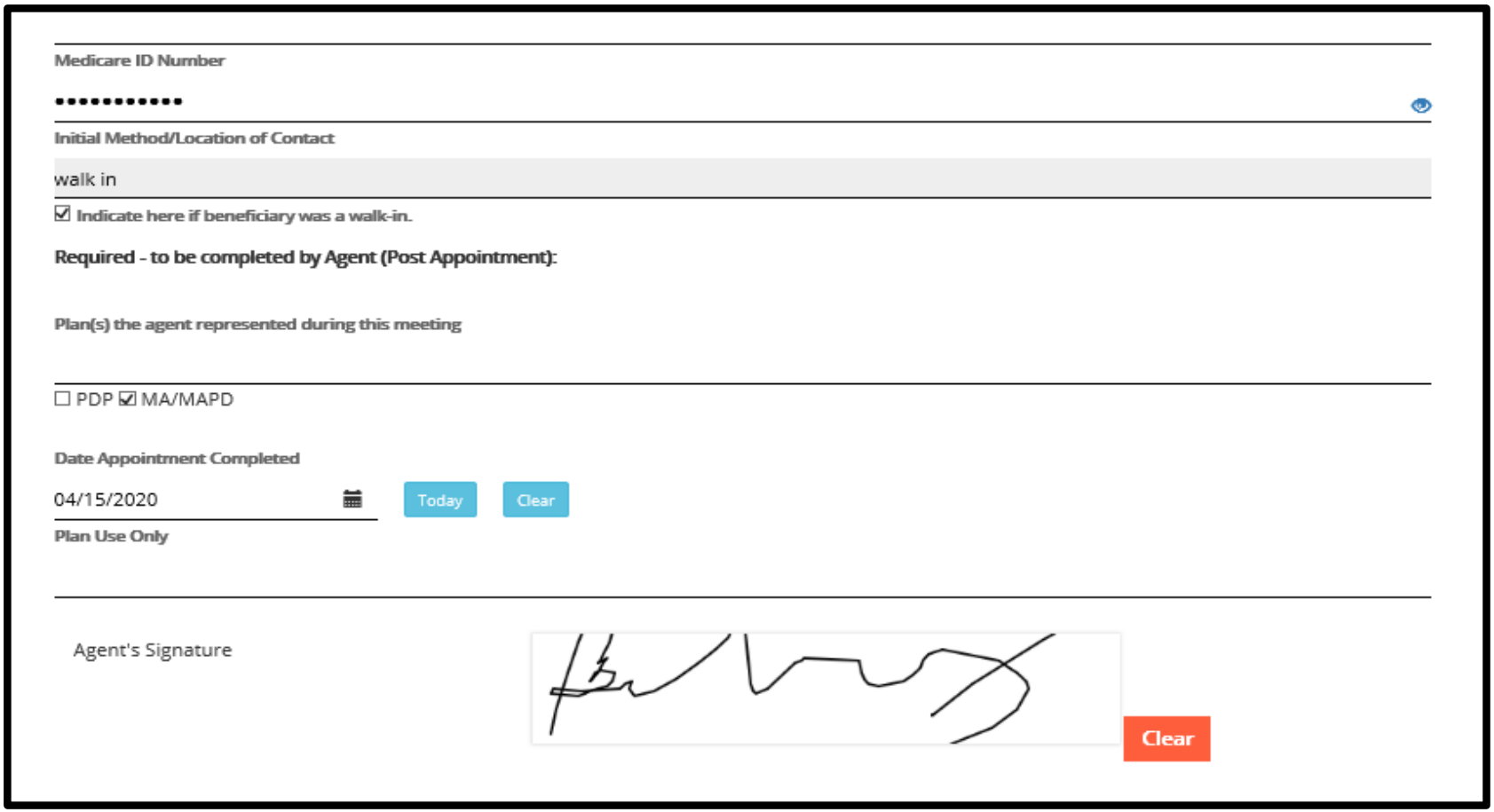
Electronic Scope of Appointment List

Tap on the initiated icon to complete SOA



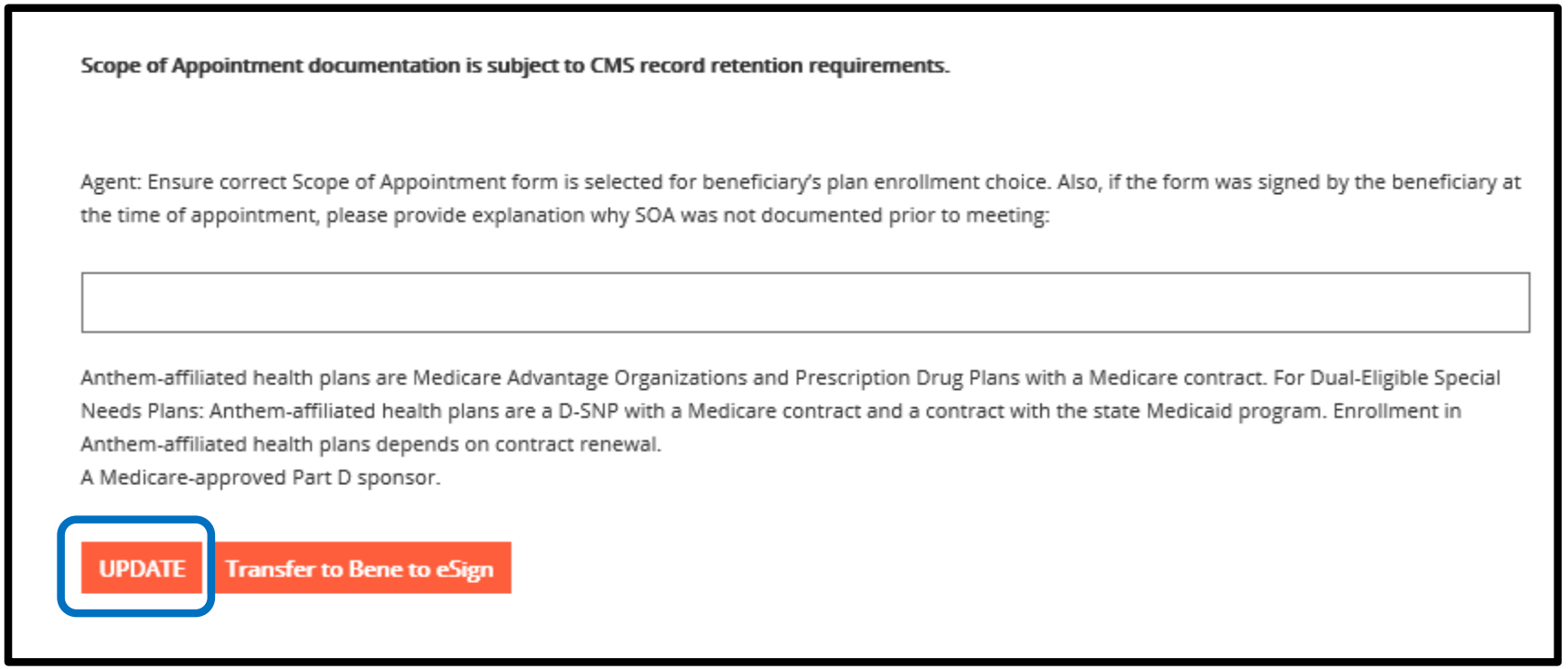
Electronic Scope of Appointment

Complete the remainder of the Scope and sign



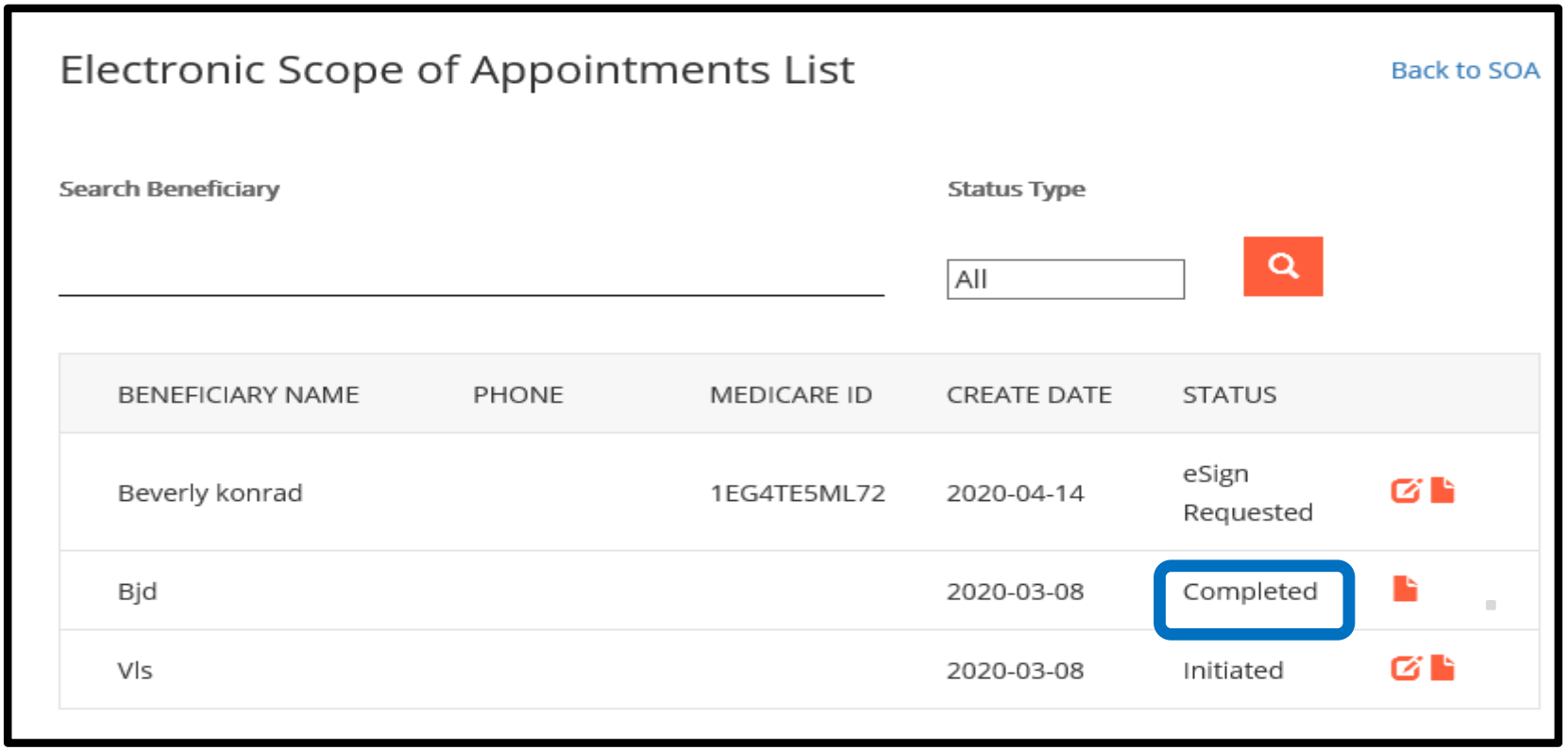
Electronic Scope of Appointment

Tap on the update icon and SOA will now appear in your Scope of Appointments List as completed



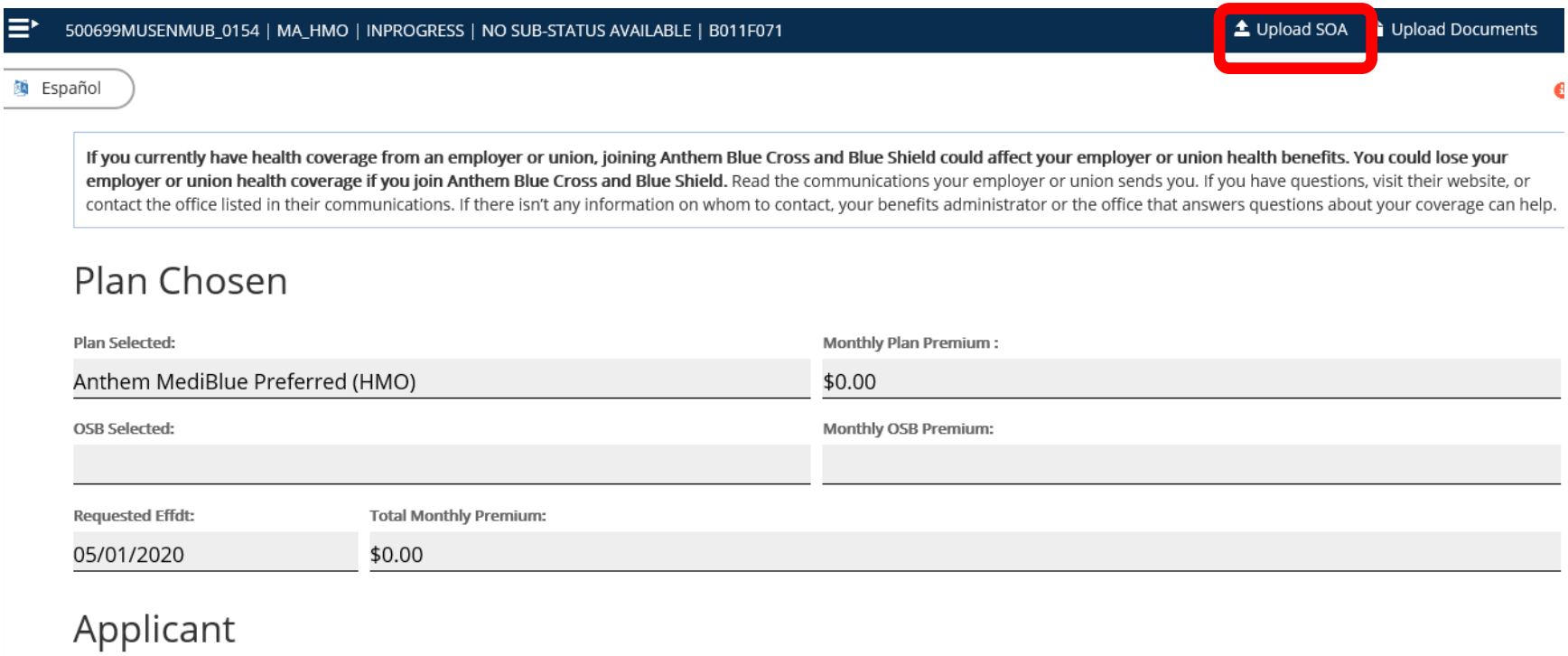
Electronic Scope of Appointments List

Your Electronic Scope of Appointments List will reflect a Completed Status.



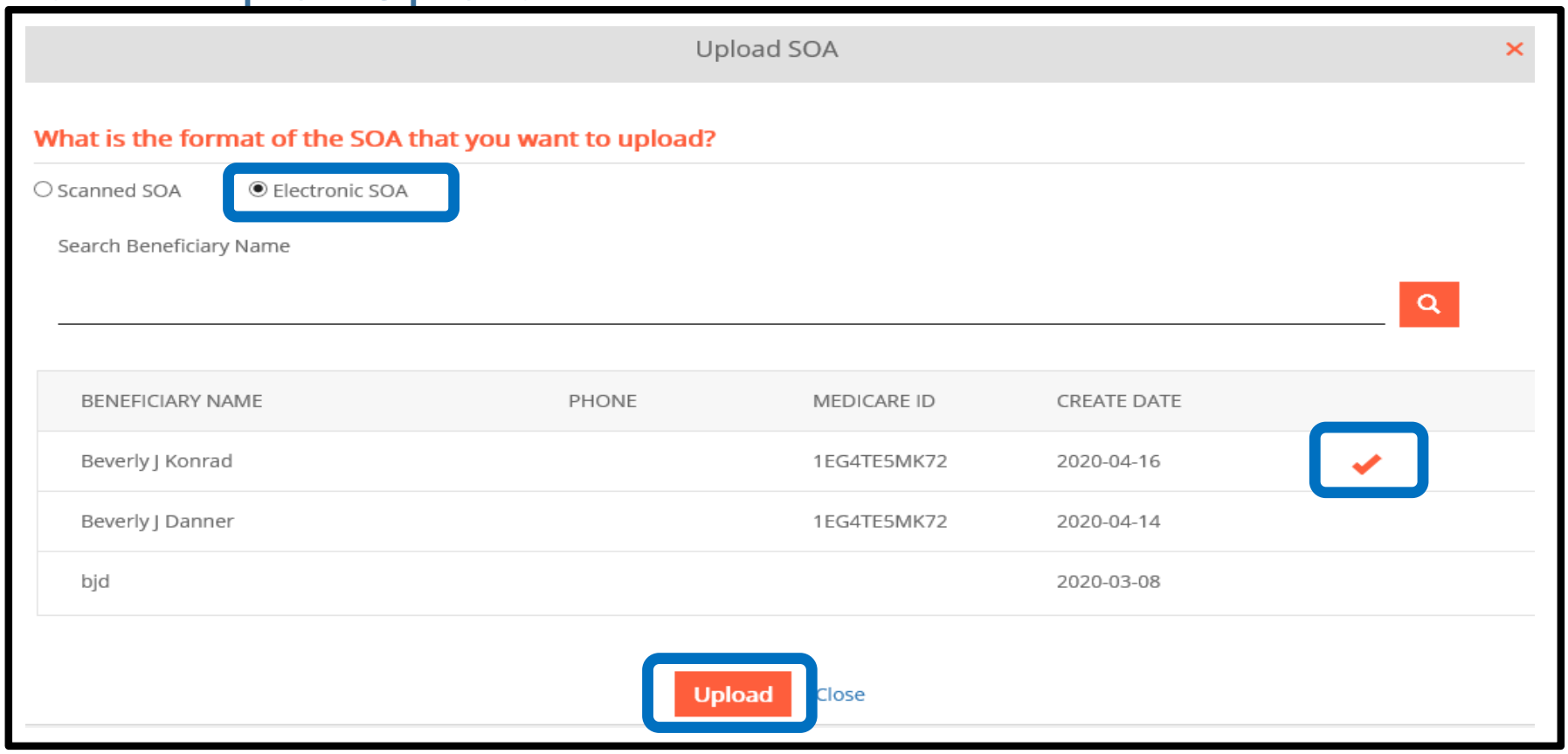
Upload Scope of Appointment

At any point while you are completing the application to transfer to client for signature, upload the eSOA.

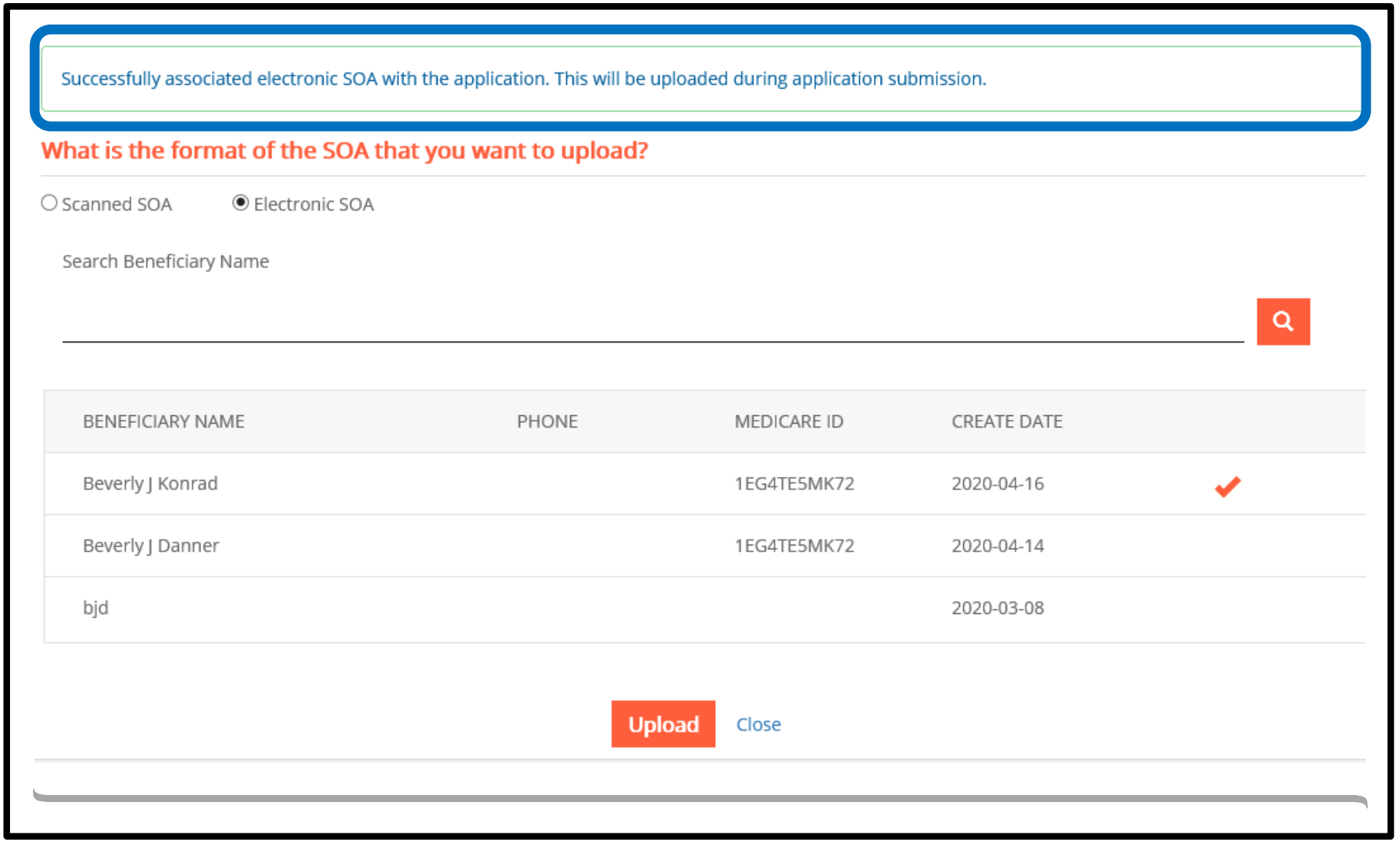


Upload Scope of Appointment

Select Electronic SOA. Tap on area to the right of the create date. Tap on Upload.



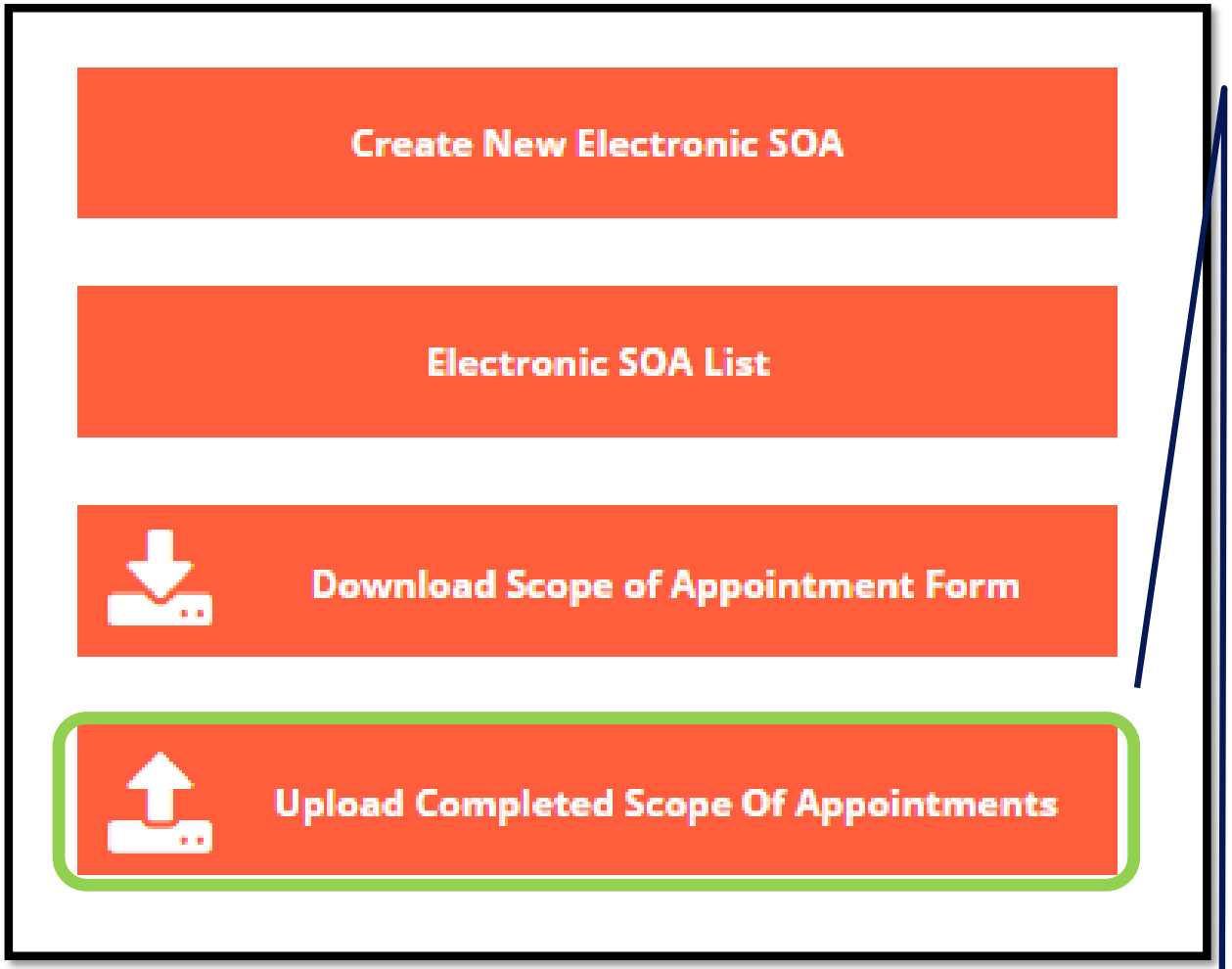
Electronic SOA Upload Confirmation



Upload Electronic SOA's

Upload Electronic SOA's

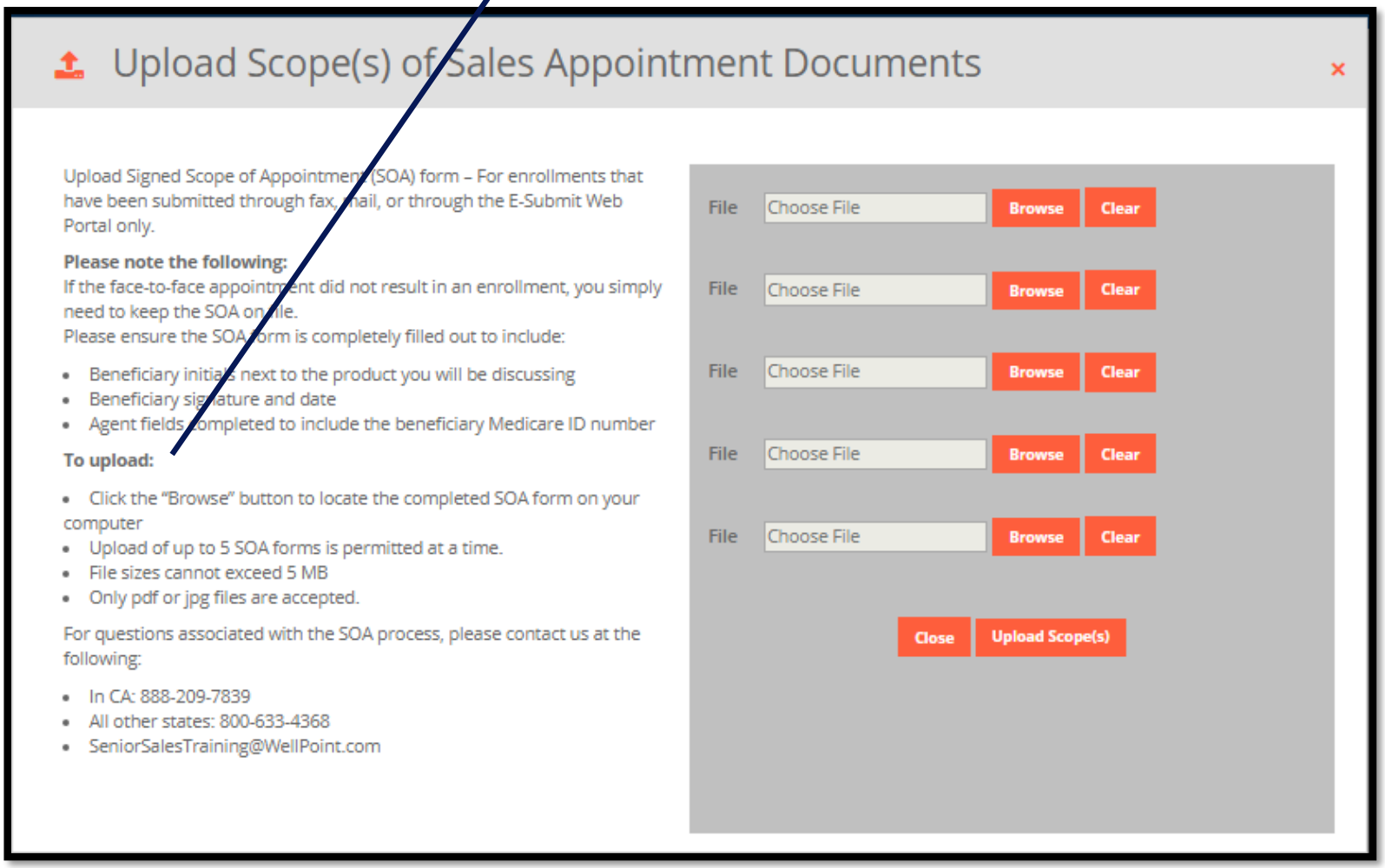
Upload SOA



To upload a completed paper SOA, click the **Upload Completed Scope of Appointments** button. This allows brokers to upload SOA's independently of the application.

Upload FAQ

Follow the directions to upload an SOA.

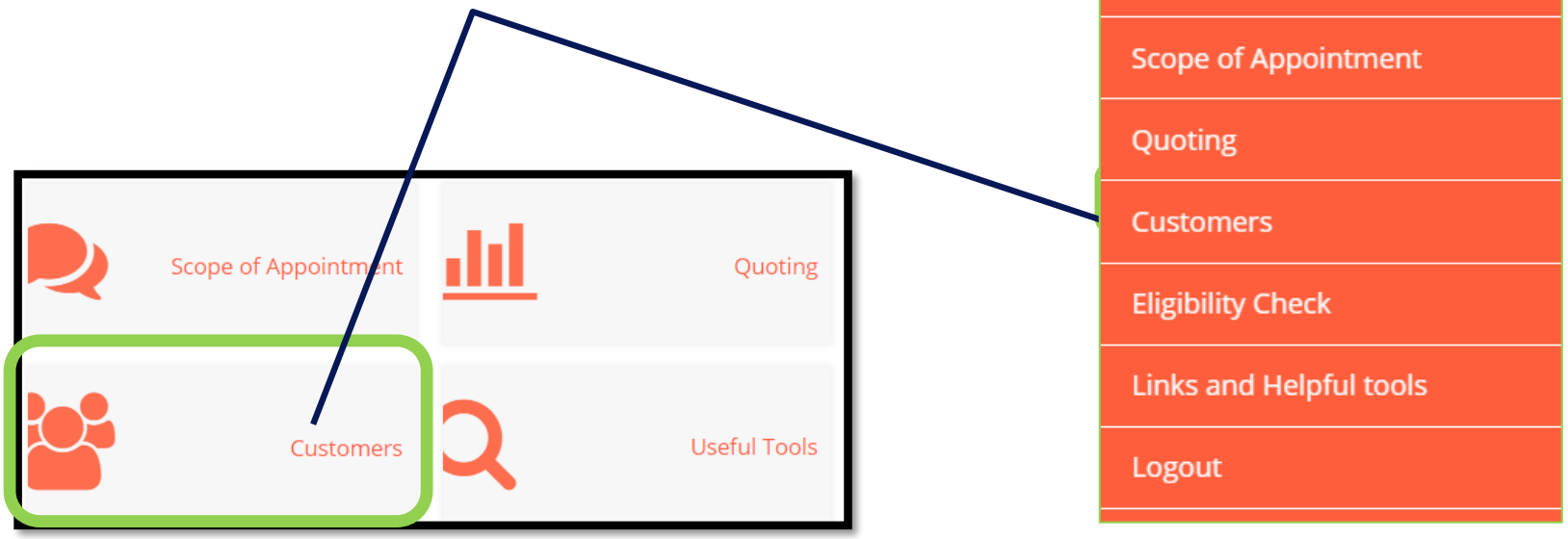


mProducer

Managing customers

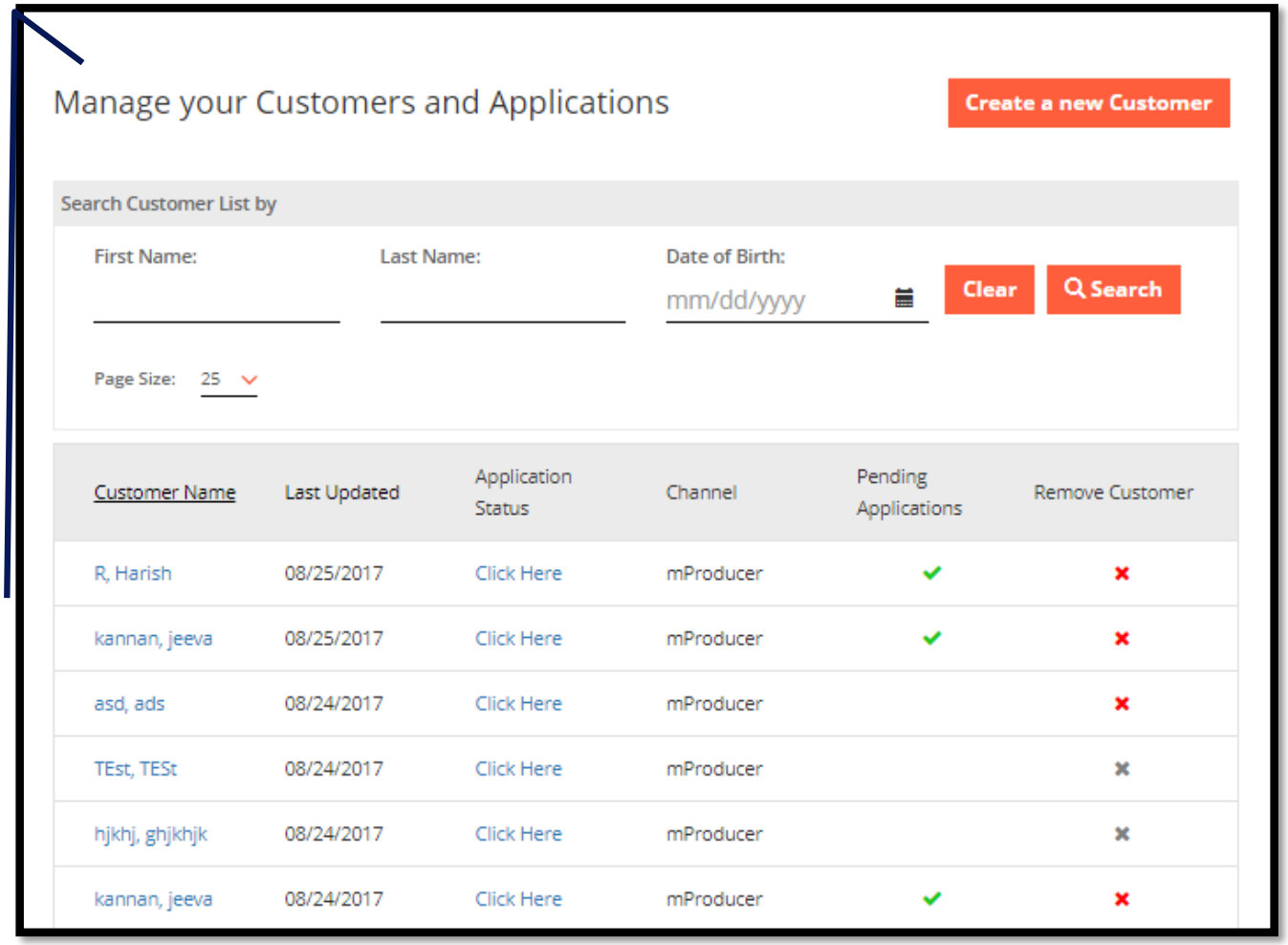
Customers

From the Home page, click on the **Customers** tile. From any page, you can click the ***Menu*** icon and select **Customers**.



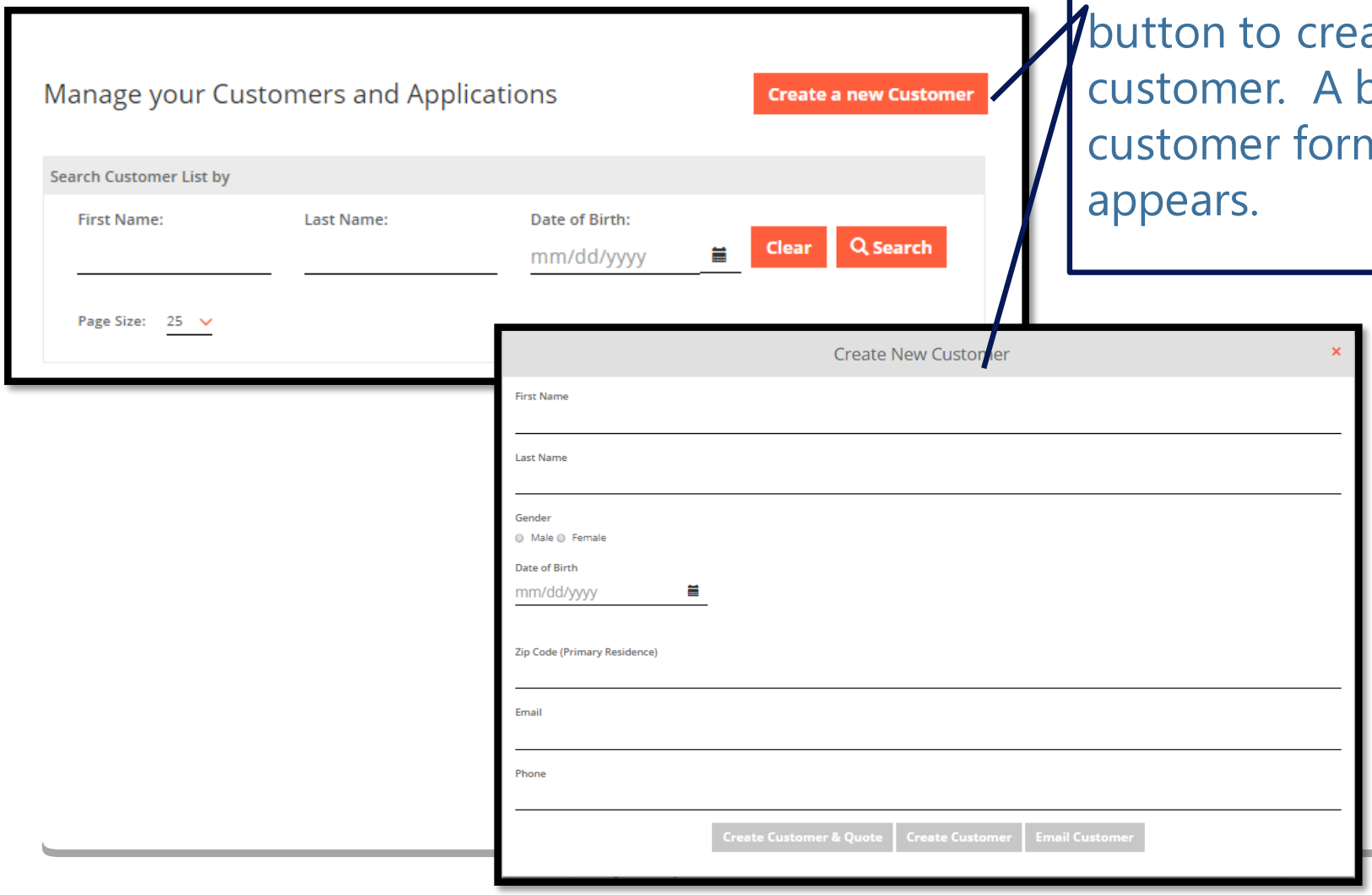
Customer List

From the landing page, you can manage your existing customers or create new customers.



Creating a Customer

Click the **Create a new Customer** button to create a customer. A blank customer form appears.



Creating a Customer FAQ

All fields, except **EMAIL**, are required to save the customer.

You cannot edit customer information once the customer has been saved!

- If you made a mistake, delete the customer record and create a new one.

If you don't have the **EMAIL** when creating the customer, you can still capture it an application, but you cannot add it to the customer record once the customer has been saved.

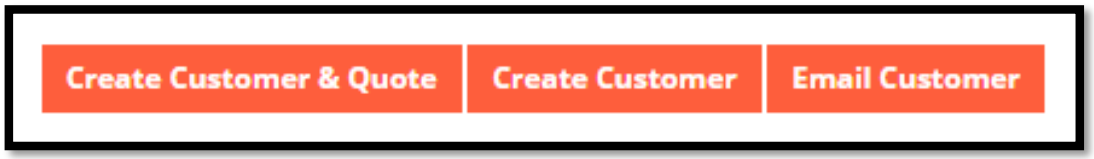
Saving the Customer

Click one of the ***Create Customer*** buttons to save the customer.

- **Create Customer & Quote** takes you to the Plans section.
- **Create Customer** takes you back to the Customer list.

You have the option to email the customer by clicking **Email Customer.**

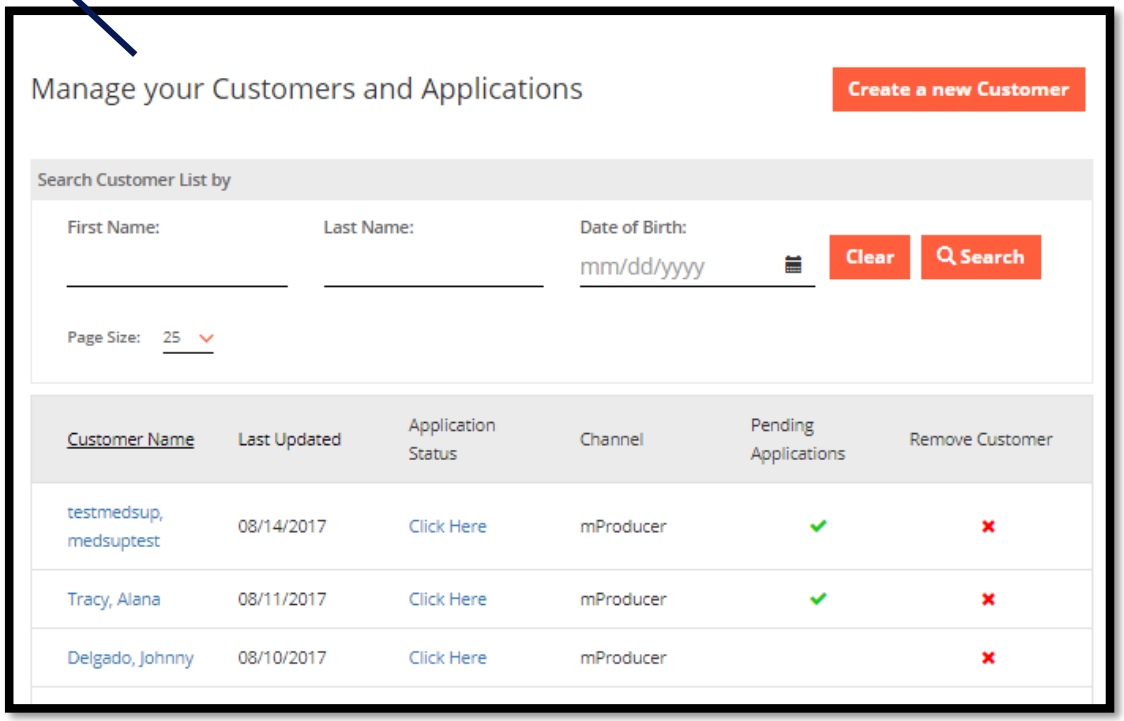
- This does not save the customer! You must still click one of the other buttons to save the customer.



Managing Existing Customers

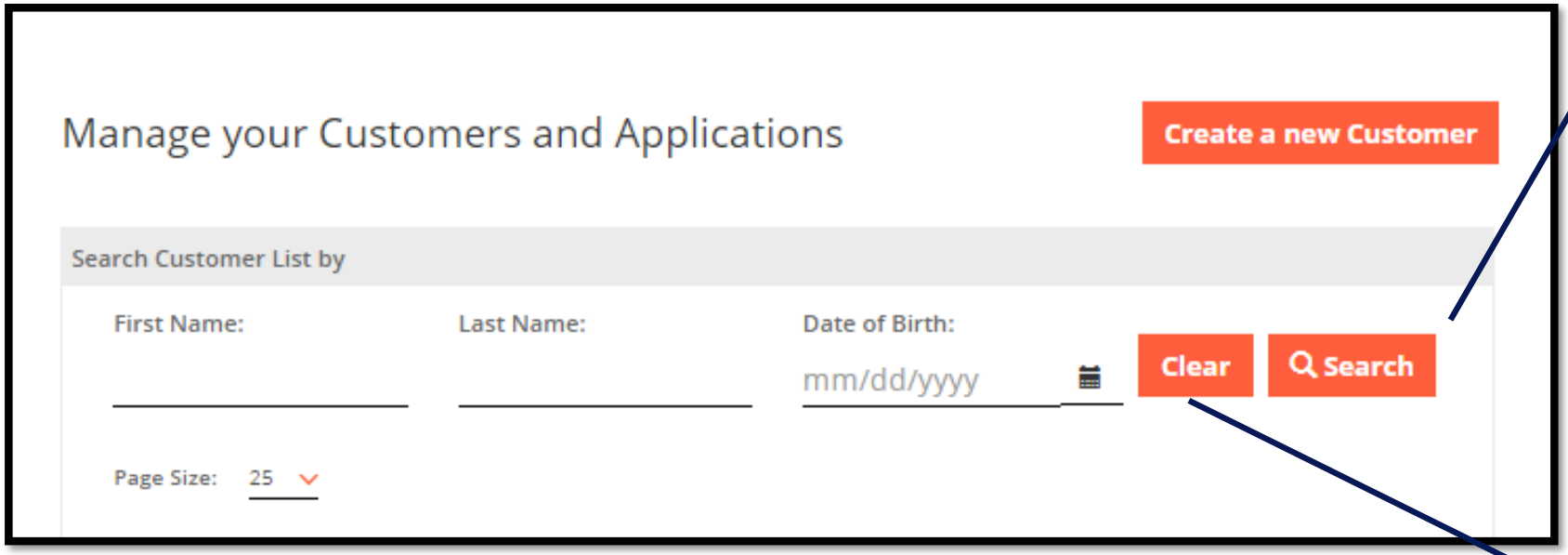
Existing customers appear in descending order based on the date they were last updated.

This benefits you because the customers with which you have recently interacted appear at the top of the list.



Searching for Customers

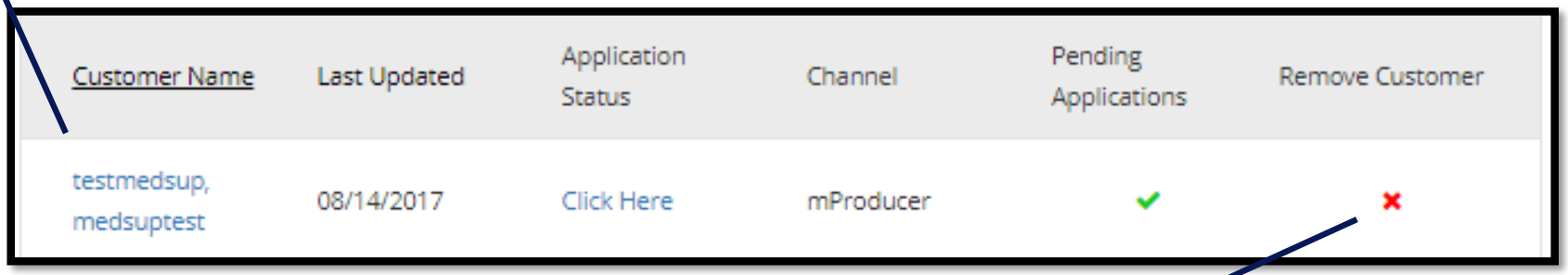
You can search for an existing customer by entering search criteria and clicking on the **Search** button.



To clear the search criteria and return all customers, click the **Clear** button.

Customer Record

Click on the **CUSTOMER NAME** hyperlink to bring up his/her demographic information.

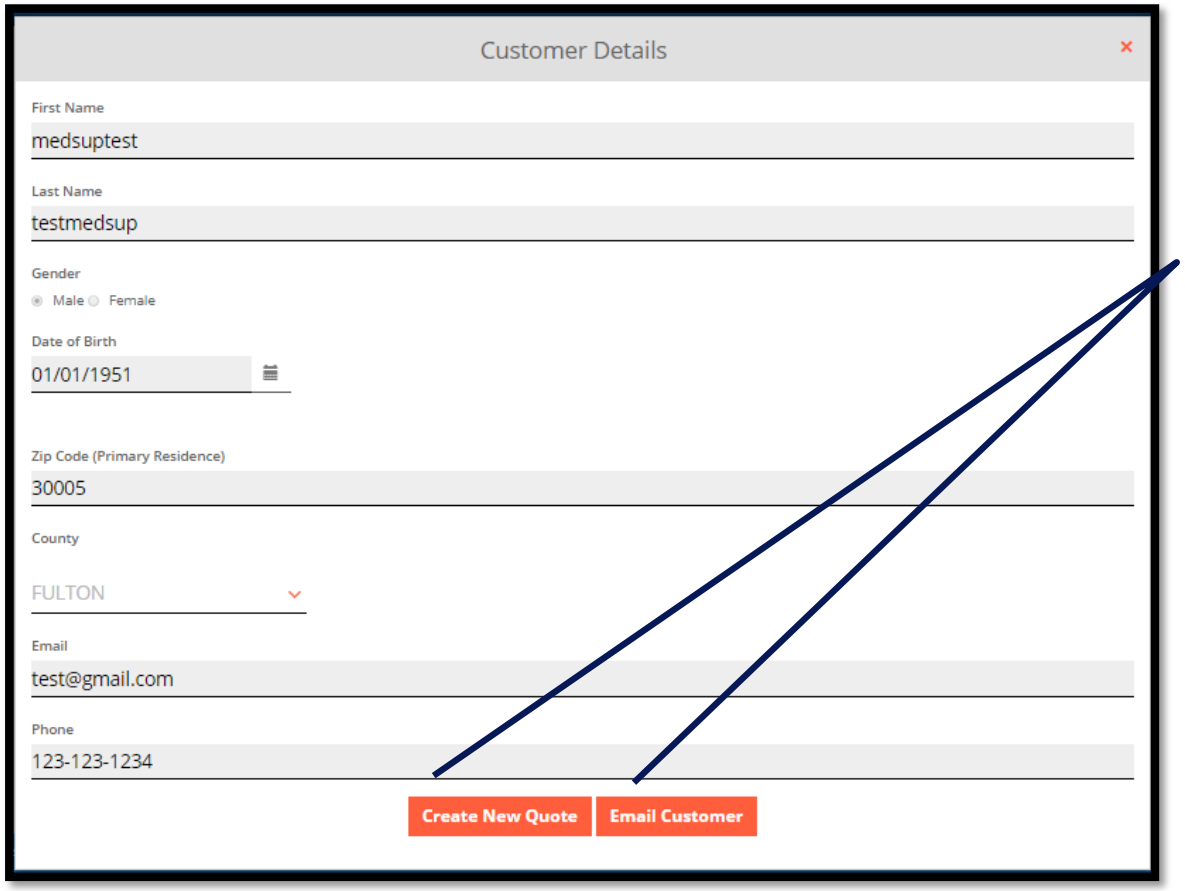


Customer Name	Last Updated	Application Status	Channel	Pending Applications	Remove Customer
testmedsup, medsuptest	08/14/2017	Click Here	mProducer	✔	✖

To delete a customer from this list, click the X under **REMOVE CUSTOMER**.

(If there is an ***In-Progress*** application, you will be prompted to cancel the application.)

Customer Demographic Information



You can email the customer by clicking the **Email Customer** button. *

You can generate a quote by clicking the **Create New Quote** button.

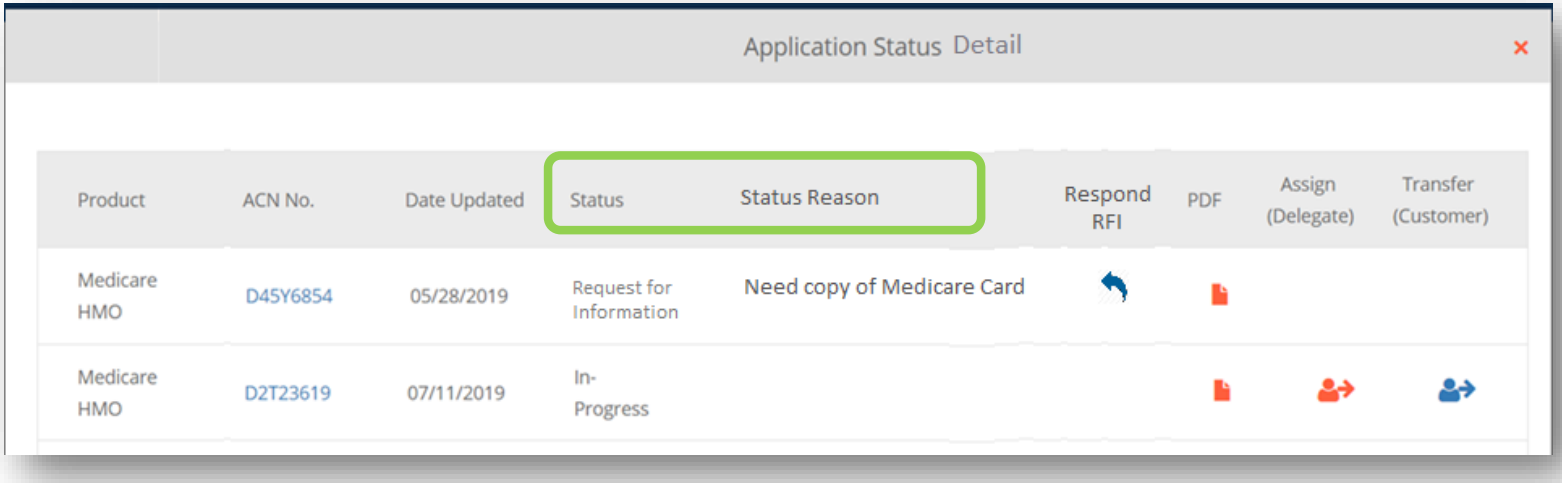
[To learn more, continue to the ***Plan Details*** page of the ***Quoting and Applying*** section of this presentation.]

* **Email Customer** opens up Outlook. It does not prompt for web-based email applications like Yahoo or Gmail.

mProducer: Statuses

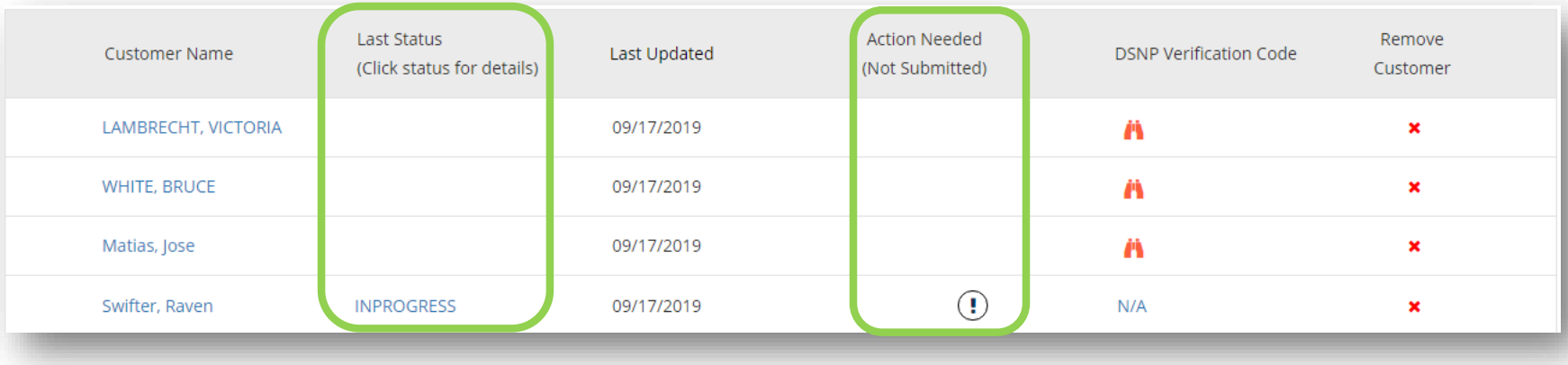
Agents will see new statuses for MA in the existing **STATUS** and **STATUS REASON** fields.

Application statuses will be real-time for both non-electronic and electronic submissions.



mProducer: In Progress Reminder

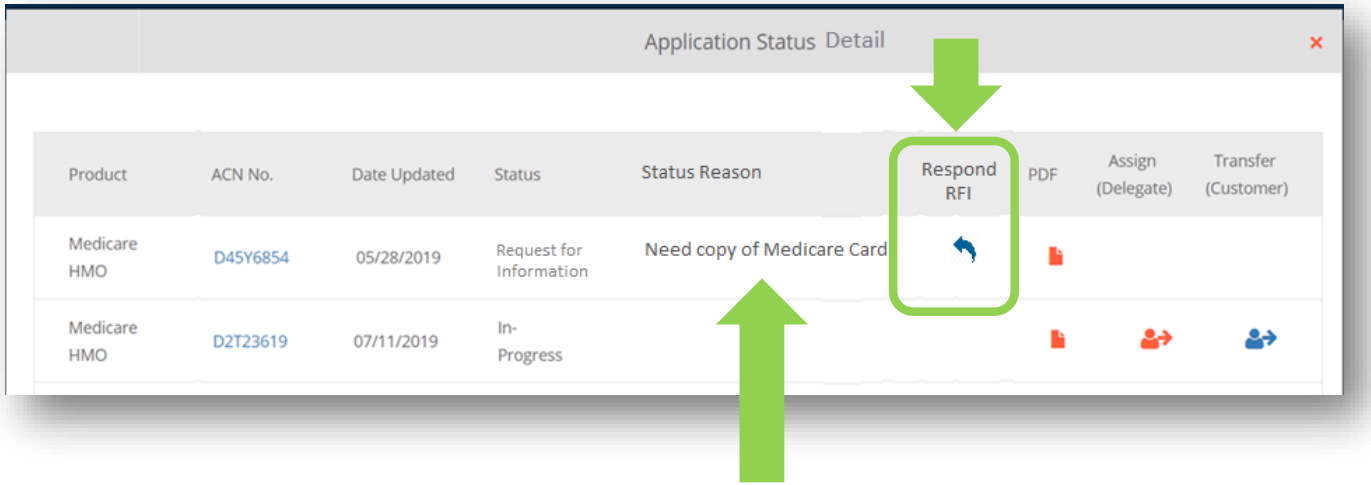
If you have **not** submitted the application, it will show with a **STATUS** of ***In-Progress*** and the **ACTION NEEDED** field will appear with an exclamation point.



Customer Name	Last Status (Click status for details)	Last Updated	Action Needed (Not Submitted)	DSNP Verification Code	Remove Customer
LAMBRECHT, VICTORIA		09/17/2019			
WHITE, BRUCE		09/17/2019			
Matias, Jose		09/17/2019			
Swifter, Raven	INPROGRESS	09/17/2019	!	N/A	

mProducer: Pending Applications and Reasons

For pending applications, agents will see a ***Respond RFI*** icon.

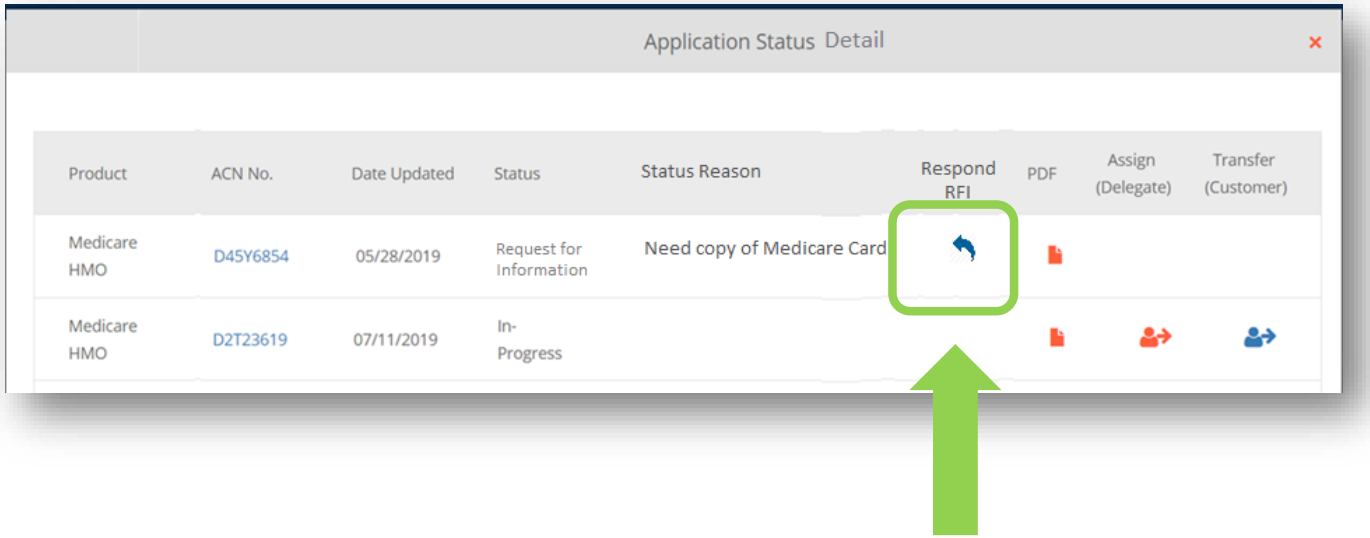


The **STATUS REASON** lists the outstanding information needed to process the application.

- Multiple RFI reasons will appear if applicable and the application area will expand as needed.

mProducer: Submitting RFI Information

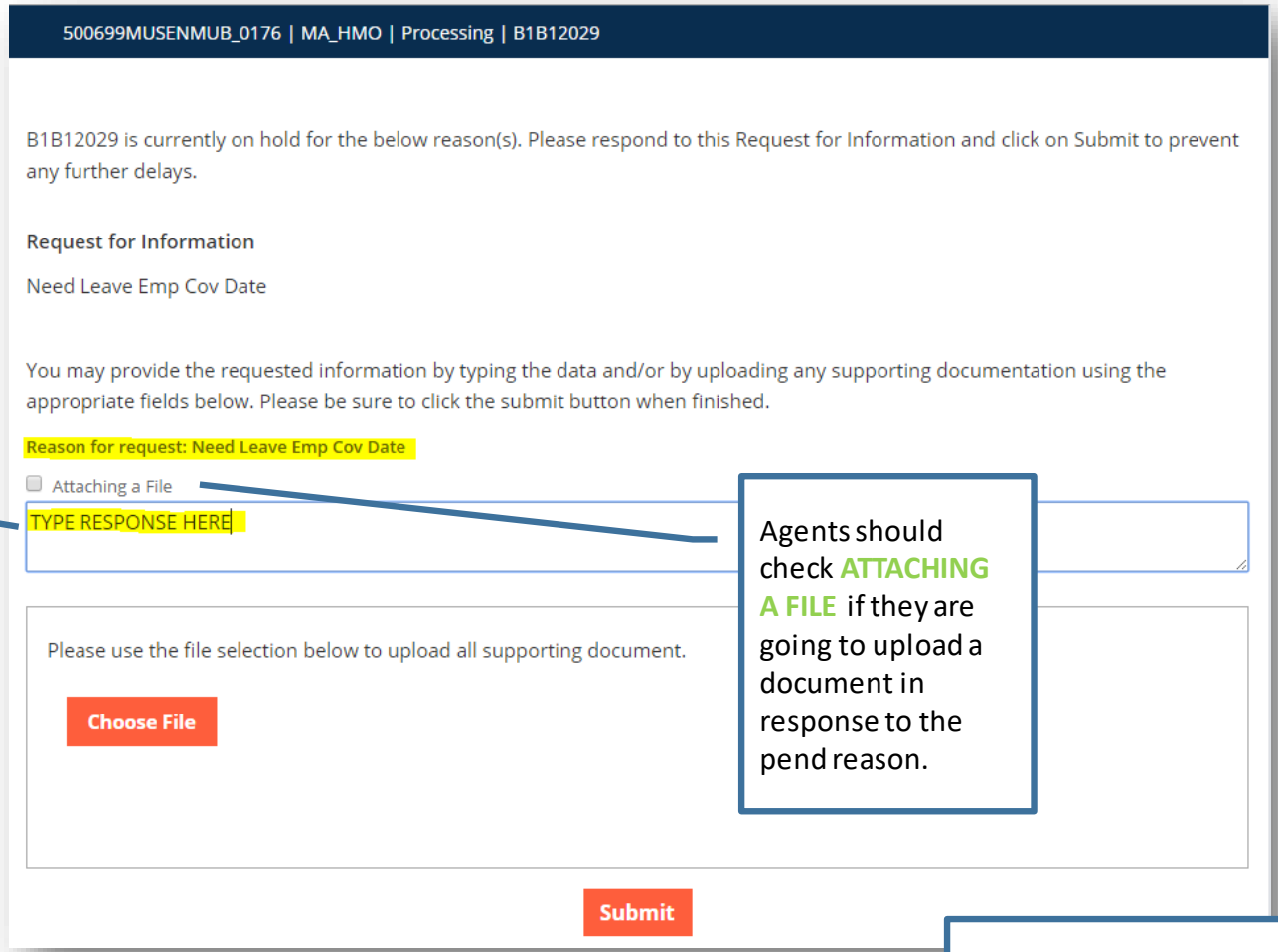
The ***Respond RFI*** icon will navigate agents to an RFI repository.



RFI Repository

There will be a separate text section for each reason that has caused the application to pend.

Agents can respond to as many or as few reasons as they are able.



Agents should check **ATTACHING A FILE** if they are going to upload a document in response to the pend reason.

Once the agent has entered his responses and selected his file(s) for uploading, he will click **Submit**.

Status
Status Reason

Status and Status Reasons

Application Received
Pending Processing

Approved
Welcome Kit/ID Card Mailed
Welcome Kit/ID Card Pending

Closed
Plan Change Complete
Plan Change Incomplete

Processed
Plan Change
Plan Change Complete

Processing
Application Validation
Pending CMS Approval
Welcome Kit/ID Card Mailed
Welcome Kit/ID Card Pending

Cancelled
Applicant Deceased
Application Cancelled
Cancelled at Applicant request
Does not have Part A and/or B
Enrollment Cancelled
Incorrect Effective Date
IRMAA Autodisenrollment
Loss of SNP Eligibility
Other Coverage
Out of Service Area
Service Area Reduction

Denied
Applicant Deceased
CMS Error
Denied
Does not have Part A and/or B
Invalid Election Period
No Response to RFI
Not Eligible
Other Coverage
Out of Service Area
Plan Change
Unauthorized Representative

Status
Status Reason

Request for Information Status Reasons

Request for Information
Need application for plan year selected
Need Authorized Rep Address
Need Authorized Rep City
Need Authorized Rep Name
Need Authorized Rep Phone
Need Authorized Rep Relationship
Need Authorized Rep State
Need Authorized Rep Zip Code
Need Copy of Medicare Card
Need date for eligibility selection
Need date for eligibilty selection
Need date in/out of PACE program
Need date moved in/out of long term care facility
Need date moved in/out of service area

Request for Information
Need date no help from Medicare
Need date of change in Medicaid
Need date returned to United States
Need Leave Emp Cov Date
Need Medicaid Eligibility
Need Member eligibility period
Need members Form 2728
Need Missing Election Period
Need POA/Guardianship documentation
Need proof of residence
Need signed application
Need to confirm plan selection
Need to confirm selected plan year
Need to validate group

Request for Information
Need to verify member address
Need to verify member residence address
Need to verify requested effective date
Need valid email
Need valid PCP selection
Need verification for chronic illness
Request for Information
Validate application received date
Validation Processing
Verify Package Id
Verify Plan Number
Verify requested Effective Date

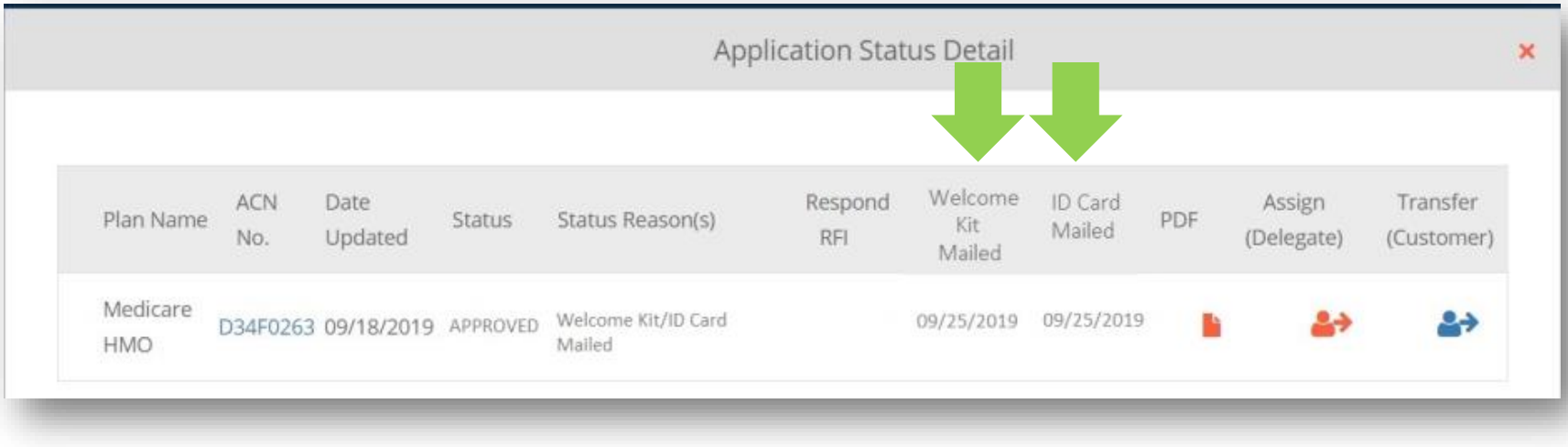
Client and Agent Communication

Clients will receive mailed notices from Enrollment when information is needed.

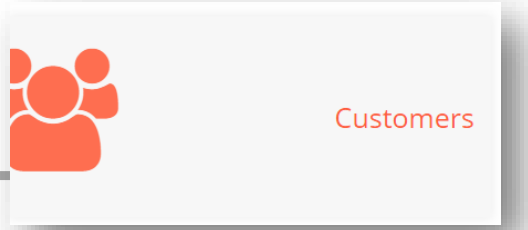
It is vital that agents communicate with clients if they have responded to RFI's on the client's behalf in order to avoid customer abrasion.

mProducer:
Welcome Kits and ID Cards Mailed Date

Agents can see the date the welcome kit and ID card are mailed.

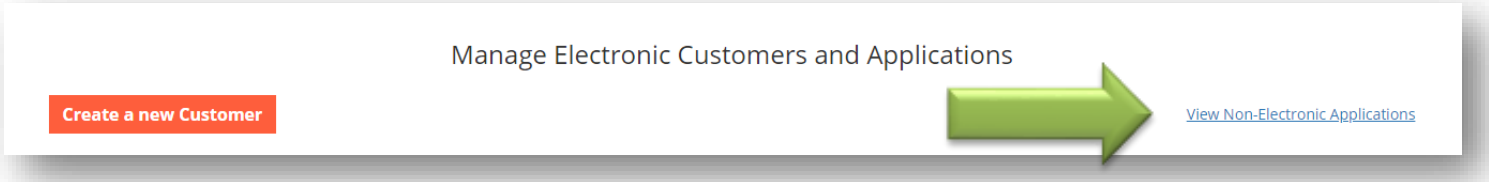


Non-Electronic Applications

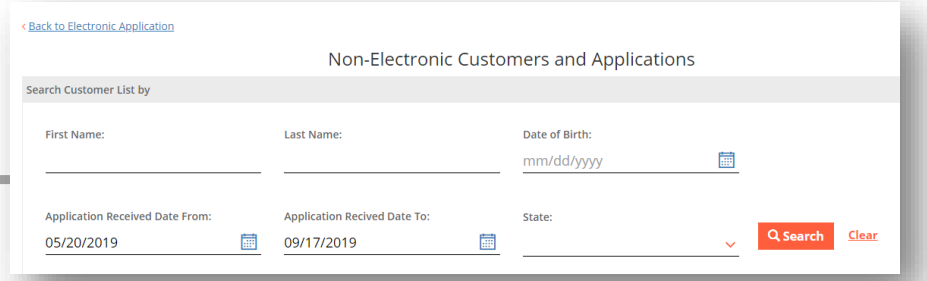


To view non-electronic applications, click on the ***Customer*** tile.

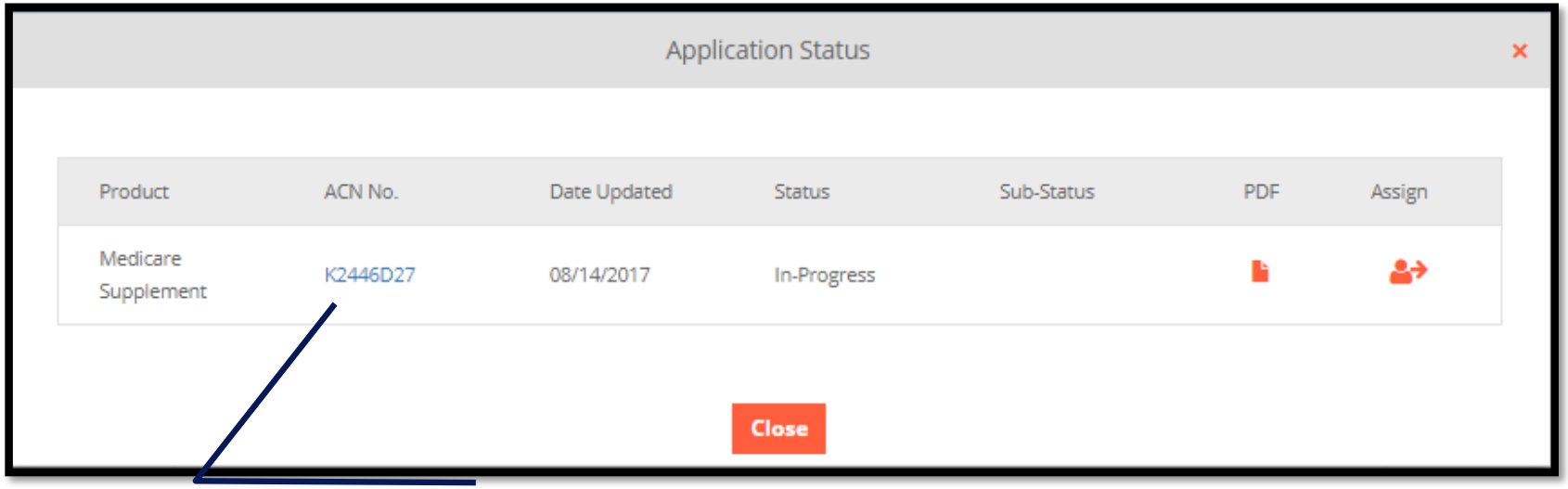
From the ***Customer*** home page, click the ***View Non-Electronic Applications*** hyperlink.



You will be navigated to a screen where you can search for and access non-electronic (fax/snail mail) submissions.



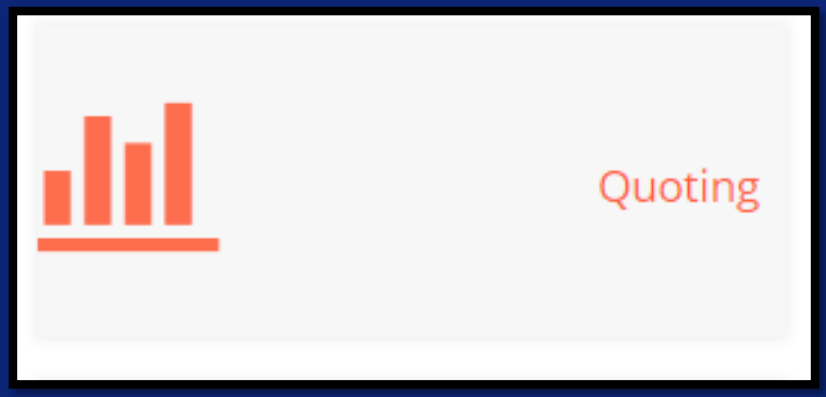
Completing Initiated Applications



To continue an application that is in-progress, click on the **ACN** hyperlink.

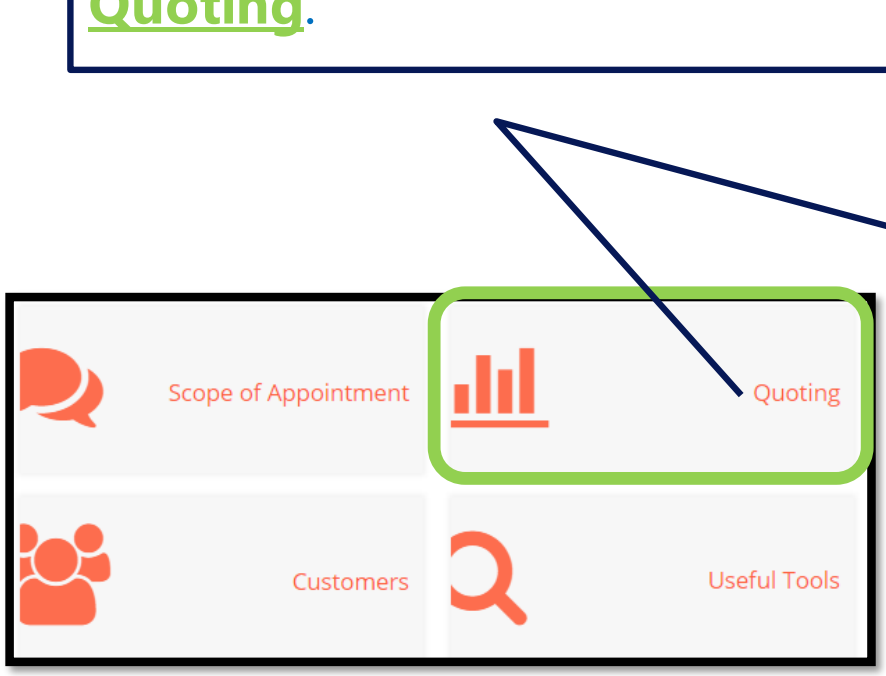
mProducer

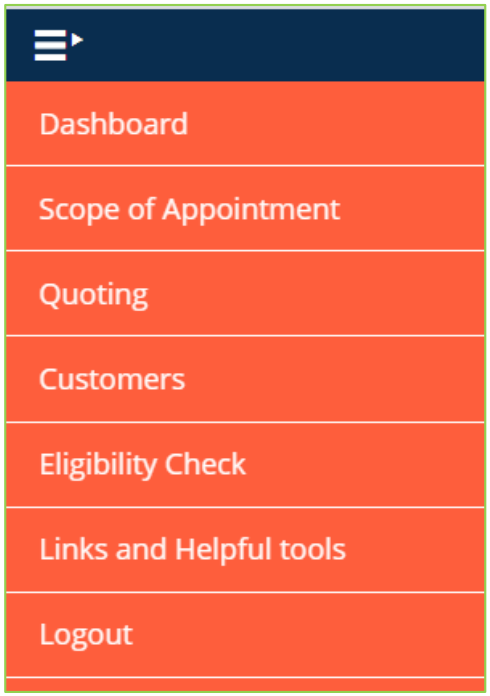
Quoting and applying



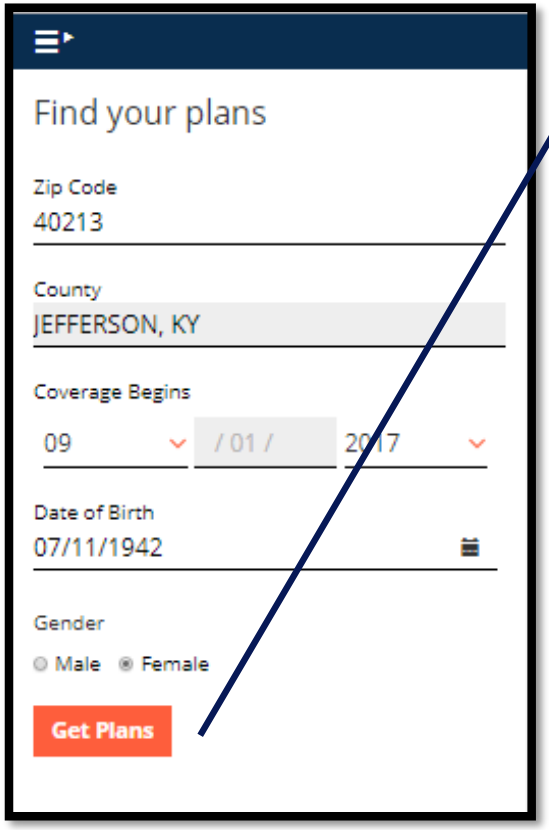
Quoting

From the Home page, click on the **Quoting** tile. From any page, you can click the ***Menu*** icon and select **Quoting**.





Find Your Plans



Enter the following information and click **Get Plans**.

- **ZIP CODE***
- **COVERAGE BEGINS ****
- **DATE OF BIRTH *****
- **GENDER**

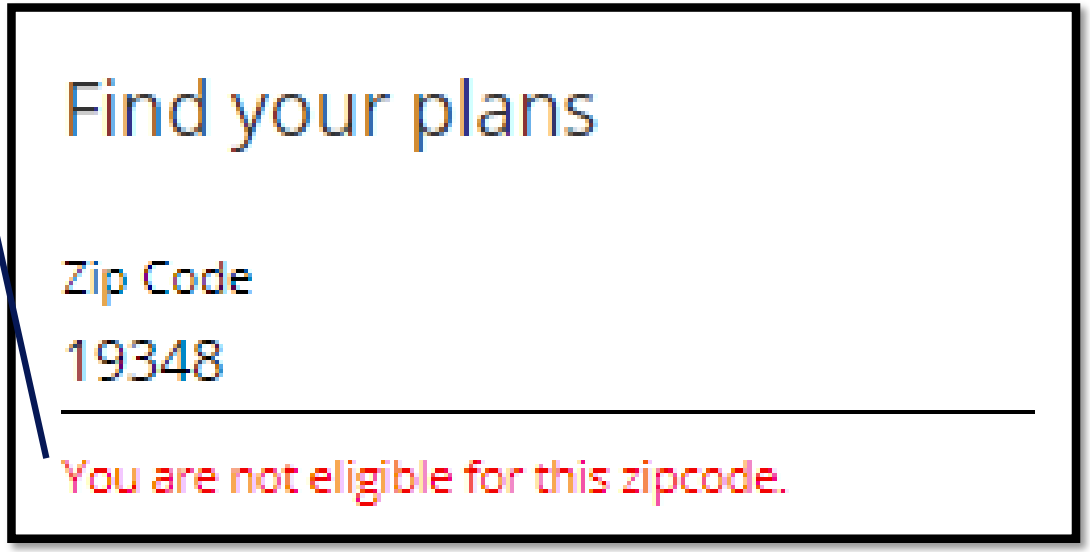
* If the **ZIP CODE** is associated to only one county, the **COUNTY** field auto-populates. Otherwise, you will need to select the appropriate **COUNTY**.

** **COVERAGE BEGINS** defaults to the 1st of the following month during lock-in and to the 1st of the following year during AEP.

*** **DATE OF BIRTH** defaults to the year that makes the client 65 for the current year.

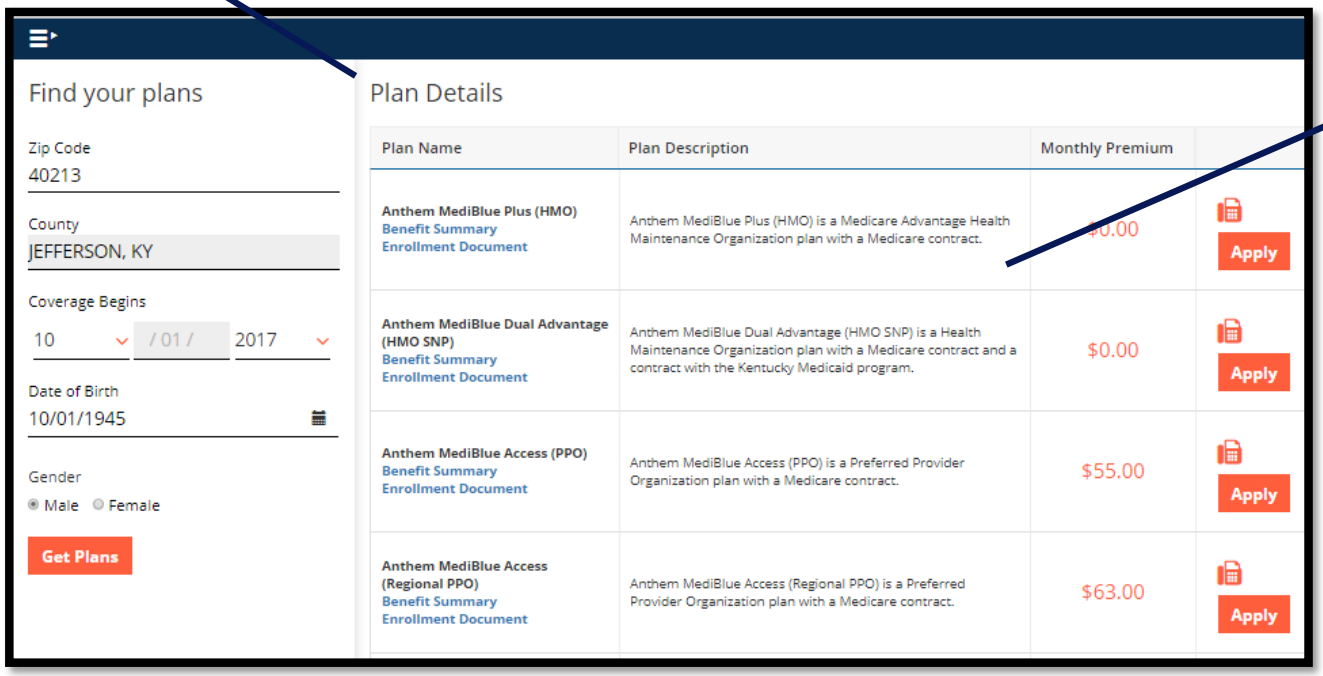
Not Licensed

If you are not licensed for a state, you will receive an error message when you attempt to generate a quote for that state.



Plan Details

A list of available plans appears in the ***Plan Details*** section, along with a high-level description and monthly premium.



Plans are sorted by MA, then Med Supp, then PDP.

Summary of Benefits

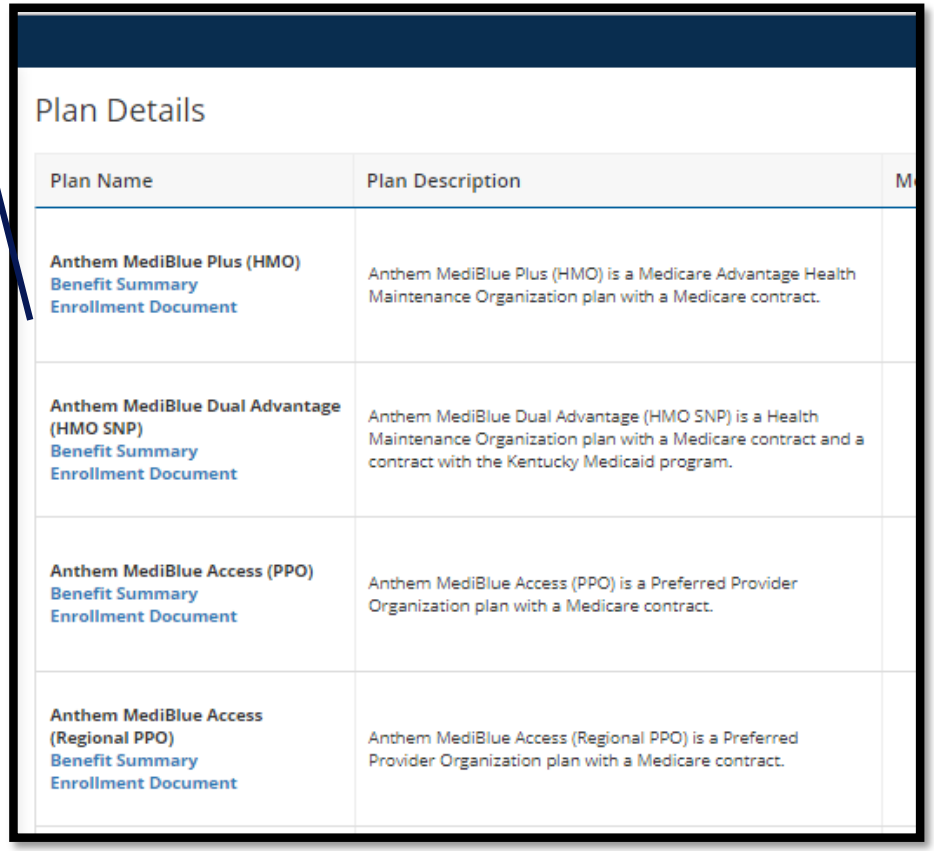
Click the ***Benefit Summary**** link for a plan to launch a PDF of the Summary of Benefits in a new window.

* This will also launch the Certificate of Coverage for MS plans.

Enrollment Documents

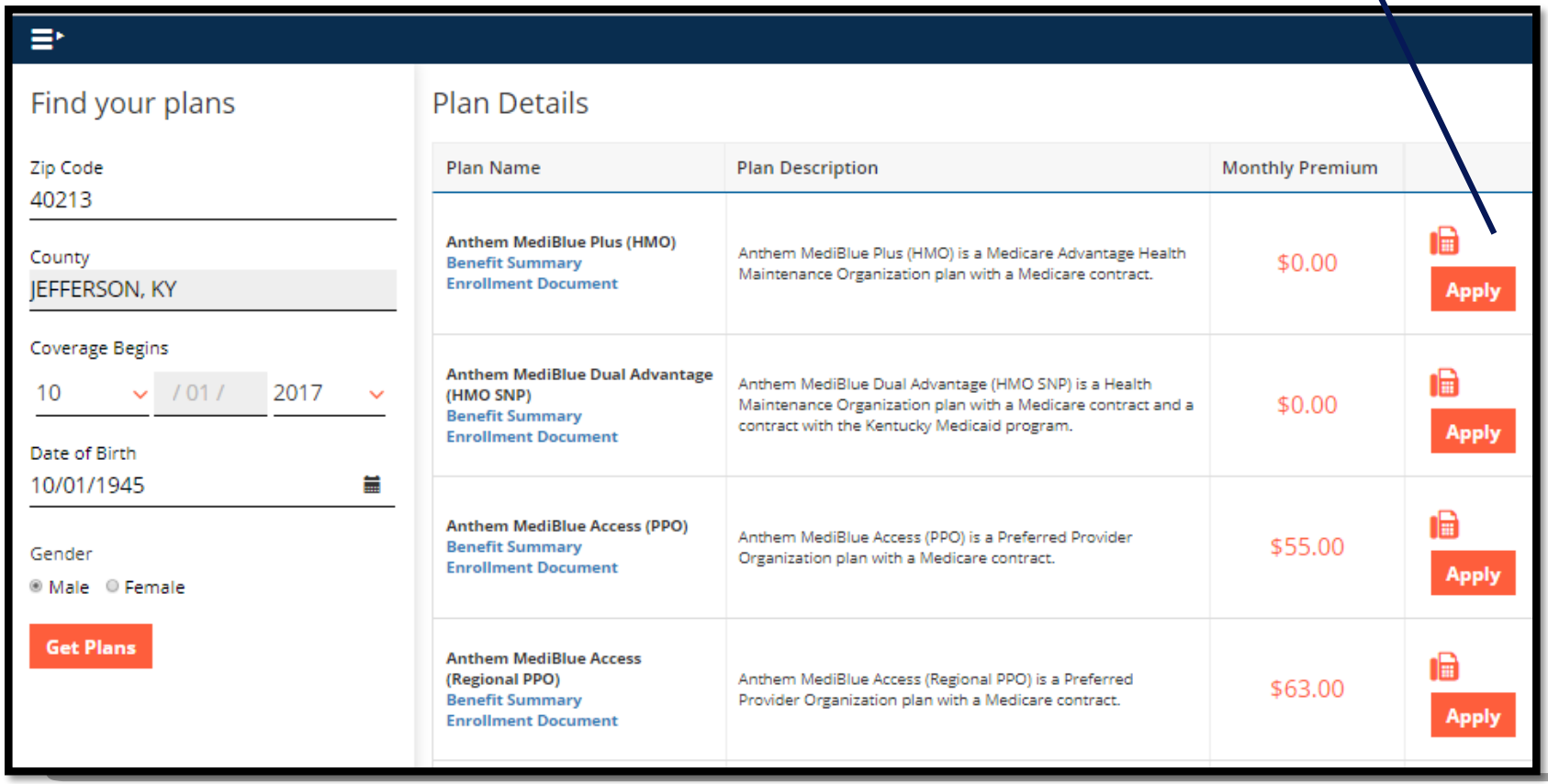
Click the ***Enrollment Documents*** link to navigate to OLS to see all content associated to the plan.

OLS will open in a new window/tab in your browser.



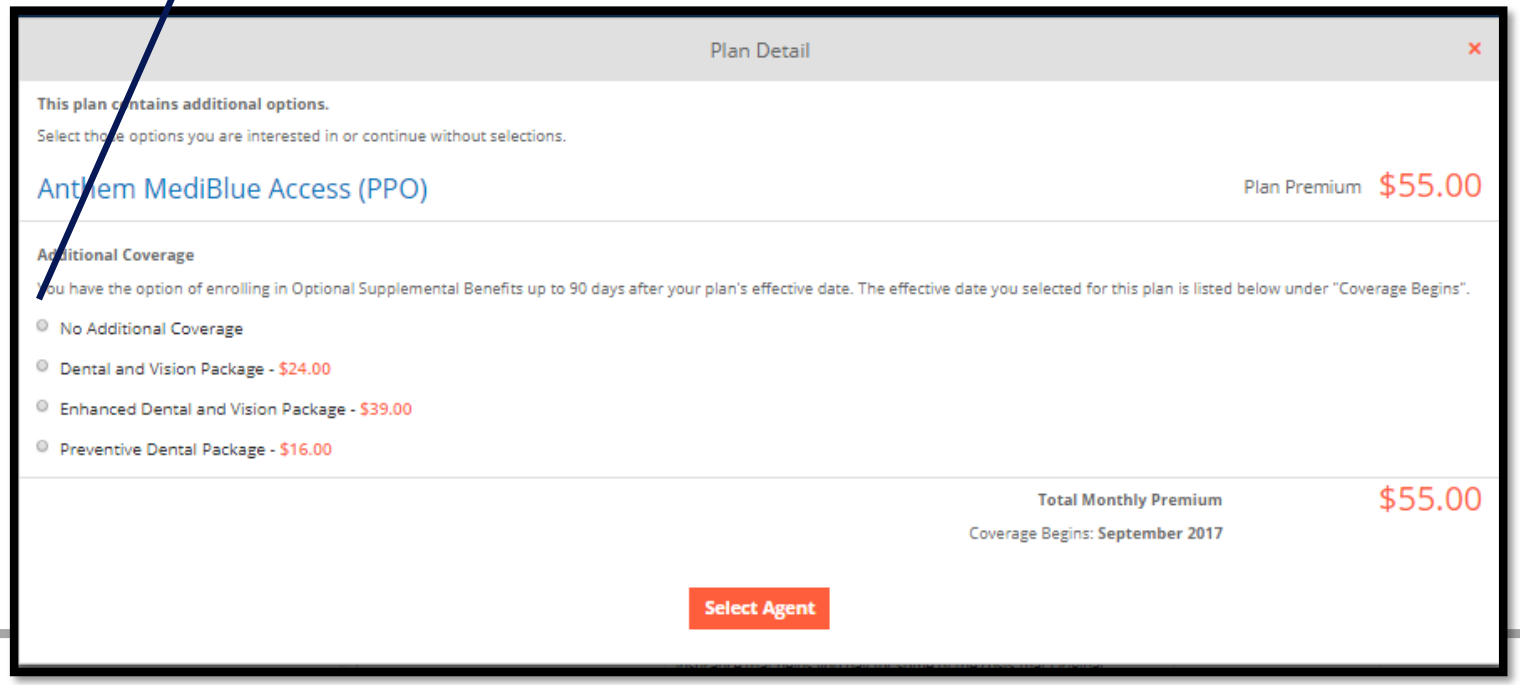
Apply

Click **Apply** for the desired plan to start an application.



Additional Coverage

If additional coverage is available for the plan, the option to select the coverage appears. Click on the desired coverage to add it.



Additional Coverage Premium

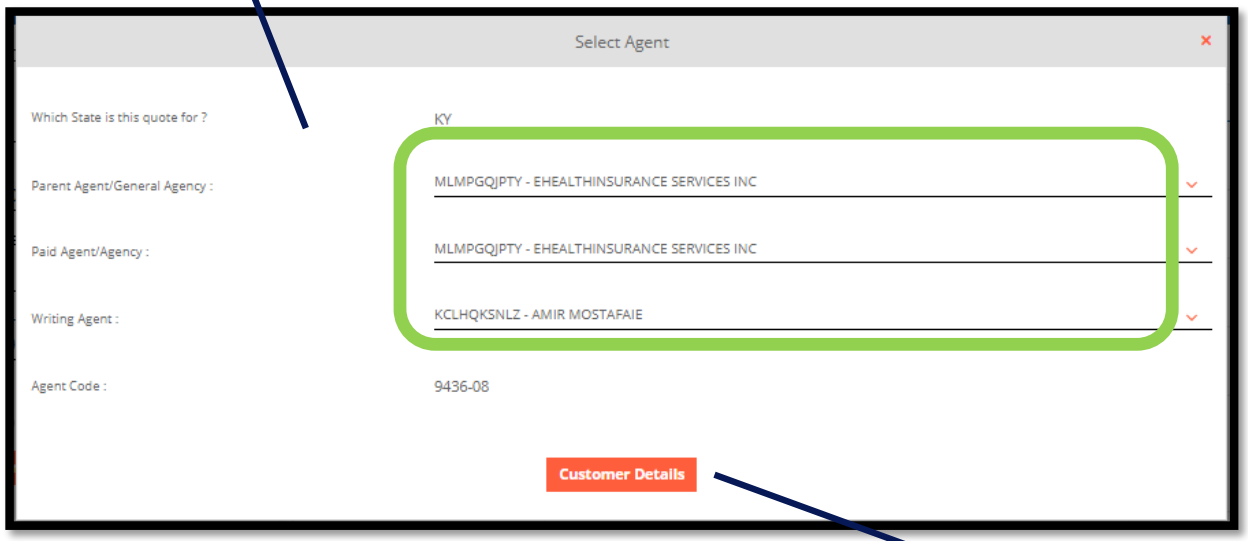
The **TOTAL MONTHLY PREMIUM** will be updated to reflect the additional premium.

Click **Select Agent** to continue.

Select Agent

Select the **PARENT**, **PAID**, and **WRITING** agent from the drop-downs. *

* Agent information feeds from the L&C system (ASCS). If information is not correct here, contact Agent Services.



Click **Customer Details** to continue.
(If you started the quote from an existing customer, this button will not display and you will have options to enroll.)

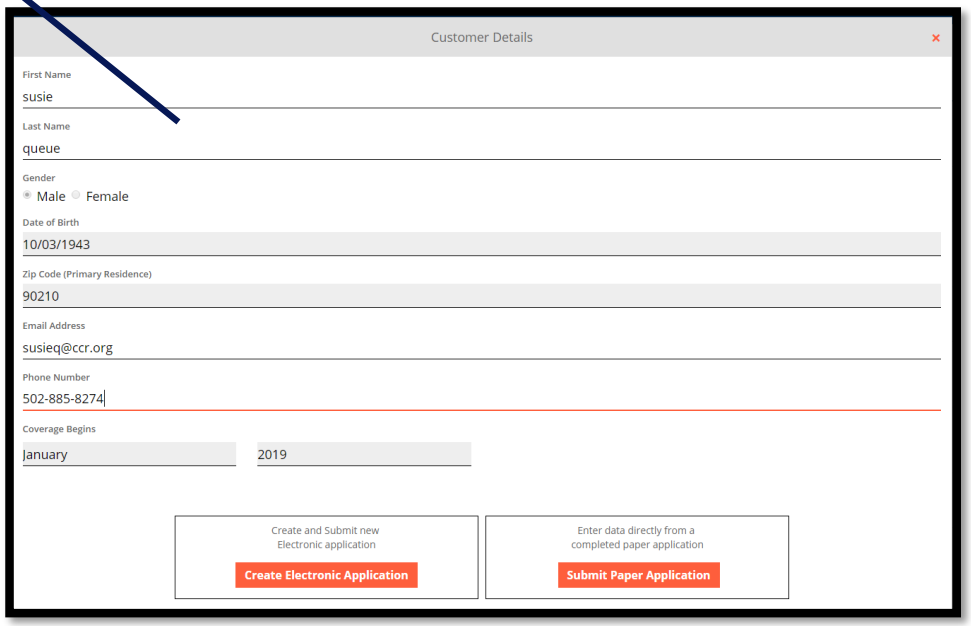
Customer Details

Enter additional customer information here.

If you started the quote from an existing customer, this page will be by-passed.

You cannot change the following fields because plans and premiums are dependent on these values:

- **GENDER**
- **DATE OF BIRTH**
- **COVERAGE BEGINS**
- **ZIP CODE**

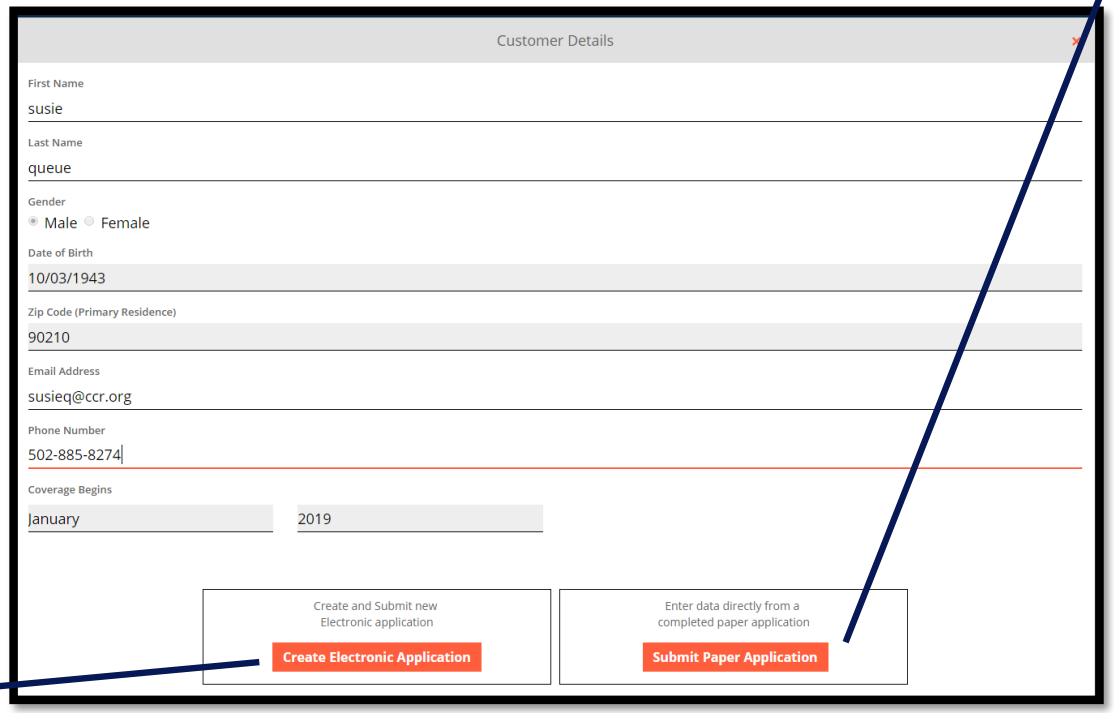


Start the Application

If you are merely keying in a paper application, click **Submit Paper Application**. This will remove the pagination, making it easier to key.

Click **Create Electronic Application** to start the application.

The customer, regardless if you complete the enrollment, will now appear on your customer dashboard if this was the first time you captured the customer information.

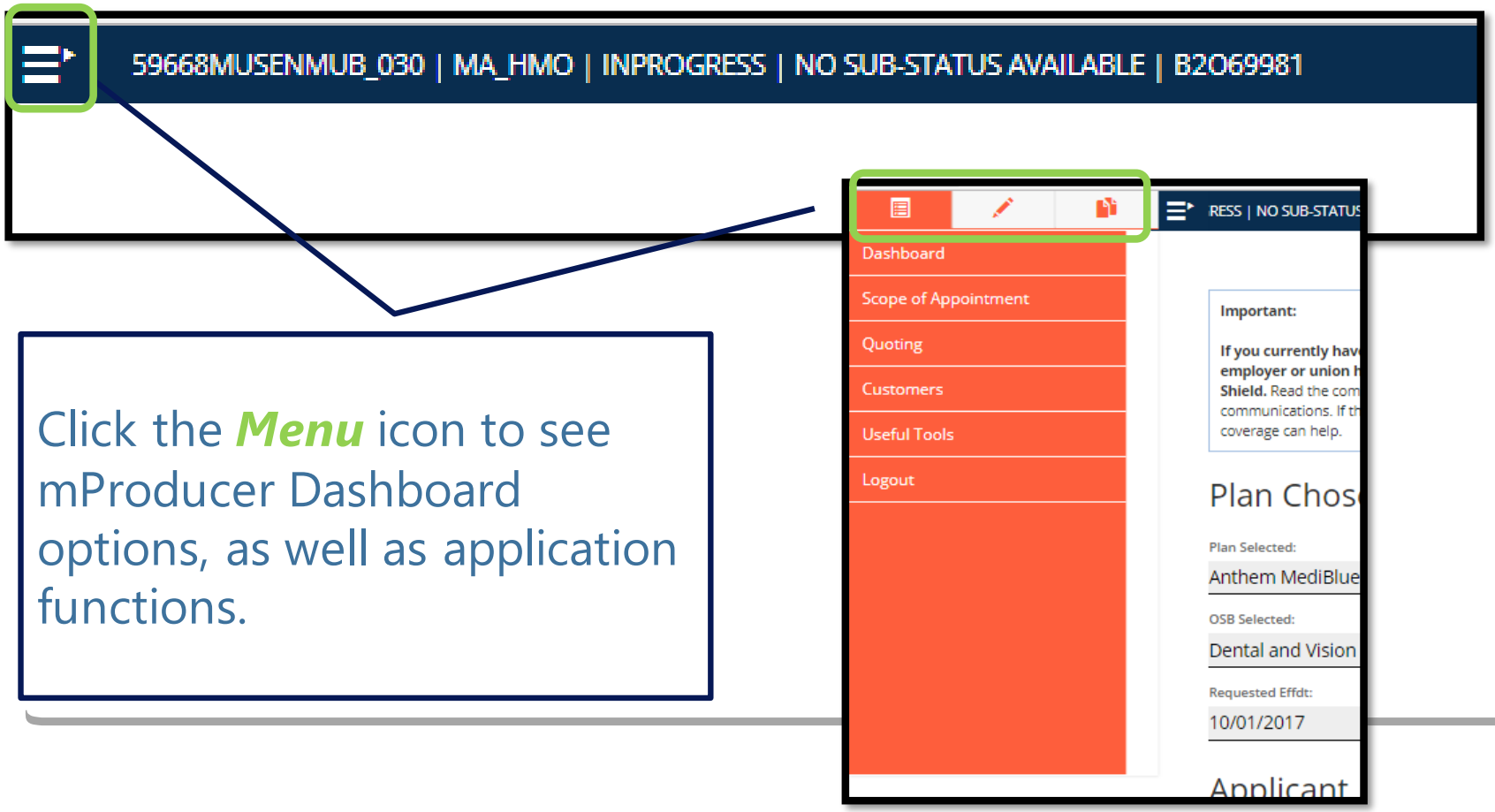


mProducer Application Navigation

mProducer Application Navigation

Application Process

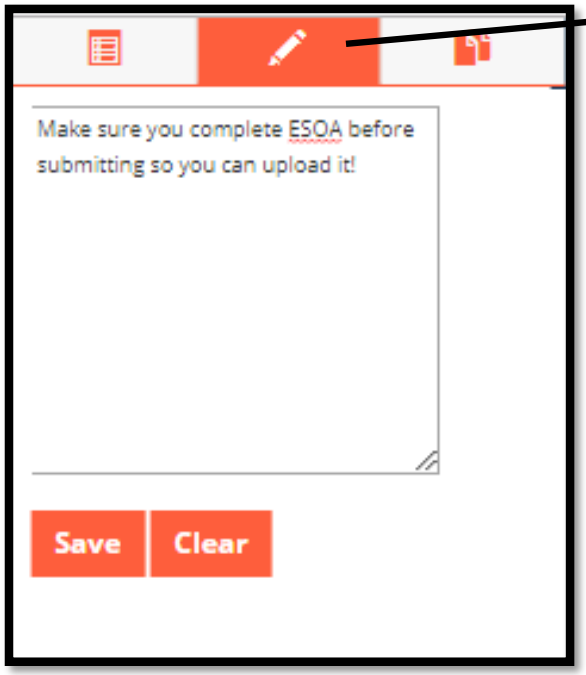
The application opens in the same window/ browser tab as mProducer.

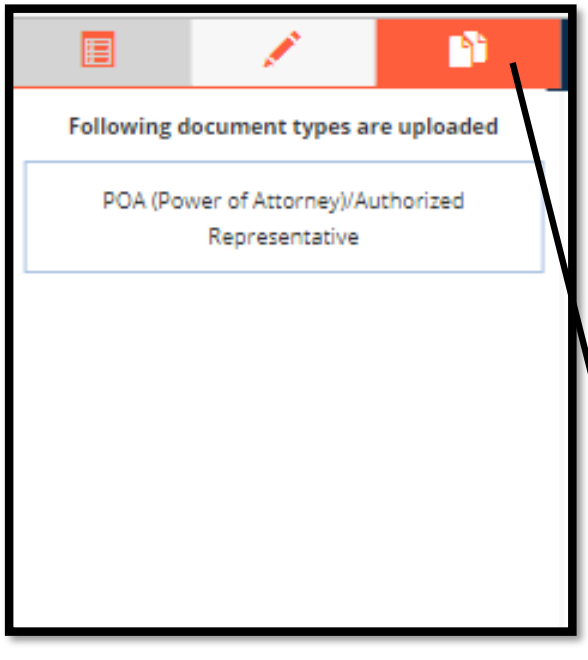


Click the ***Menu*** icon to see mProducer Dashboard options, as well as application functions.

Application Functions

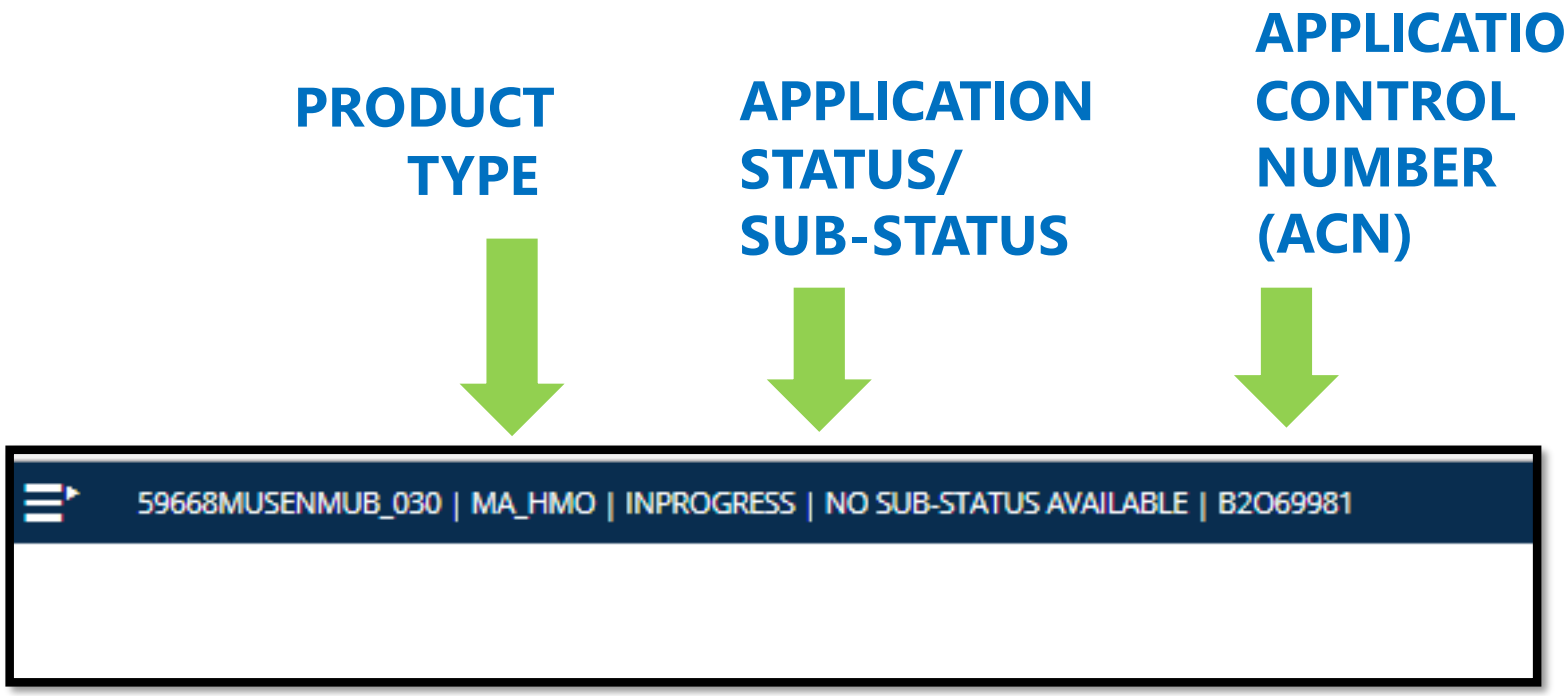
Click on the ***Pencil*** icon to trigger a note where you can jot down reminders.





Click on the ***Documents*** icon to see a list of documents that you have uploaded.

Application Information



The application follows the flow of the paper application.

Other Functions

PDF launches a PDF of the application.

Transfer button transfers the application to the customer for completion by sending an email to the customer. The customer can complete the application by logging into his/her profile *

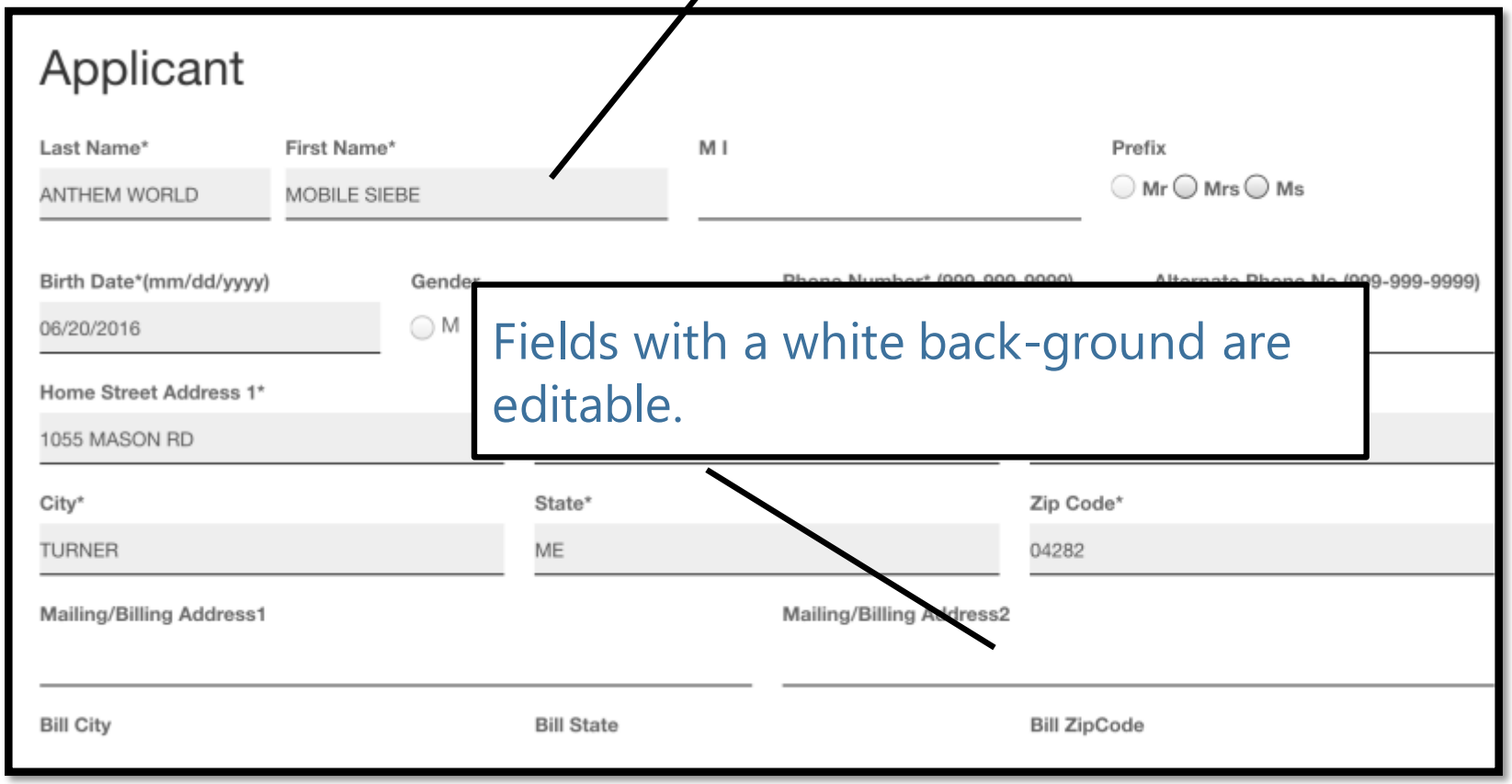
Cancel button cancels the application and you will be unable to edit or submit it.

Save button saves the application.

Moving between pages auto-saves the application.

Fields

Fields with a light gray back-ground are read-only.



Fields with a white back-ground are editable.

Application - Medicare Number

500699MUSENMUB_0154 | MA_HMO | INPROGRESS | NO SUB-STATUS AVAILABLE | Y07F4025 Upload SOA Upload Documents

Español

Bill City | Bill State | Bill ZipCode

Medicare Information

Medicare Number

Note: MBI Number will be 11-digits and upper-case letters that do not include S, L, O, I, B, Z. Example 1EG4TE5MK73

Hospital (Part A) Effective Date*(mm/01/yyyy)

Medical (Part B) Effective Date*(mm/01/yyyy) 04/01/2020

Page by Page Validation

mProducer provides page by page validation when you select a different **Page** button or the **Save** button.

Error messages appear directly under the impacted field in **red** for easier identification.

Validation Errors

When navigating to a different page, mProducer throws a hard error when errors are identified.

If you want to stay on the page to correct the errors, select **Cancel**.

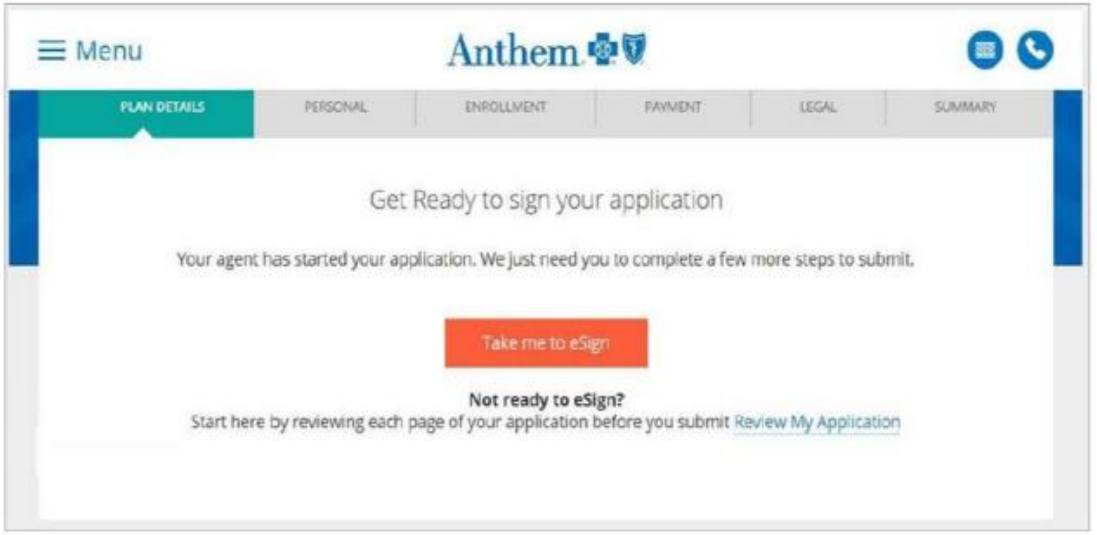
If you want to proceed to the next page, select **Ok**.

When saving the application on a page, mProducer will throw a soft error at the top of the screen if there are errors on that page. It will vanish on its own.

Transfer to E-Sign

Introduction of eSignature

- For complete applications, agents will have the ability to send their customer directly to eSignature
- Transfer to eSign will do a complete check on application for any errors
- Customer has the option to review or go directly to eSign
- Transfer to Customer functionality will remain the same

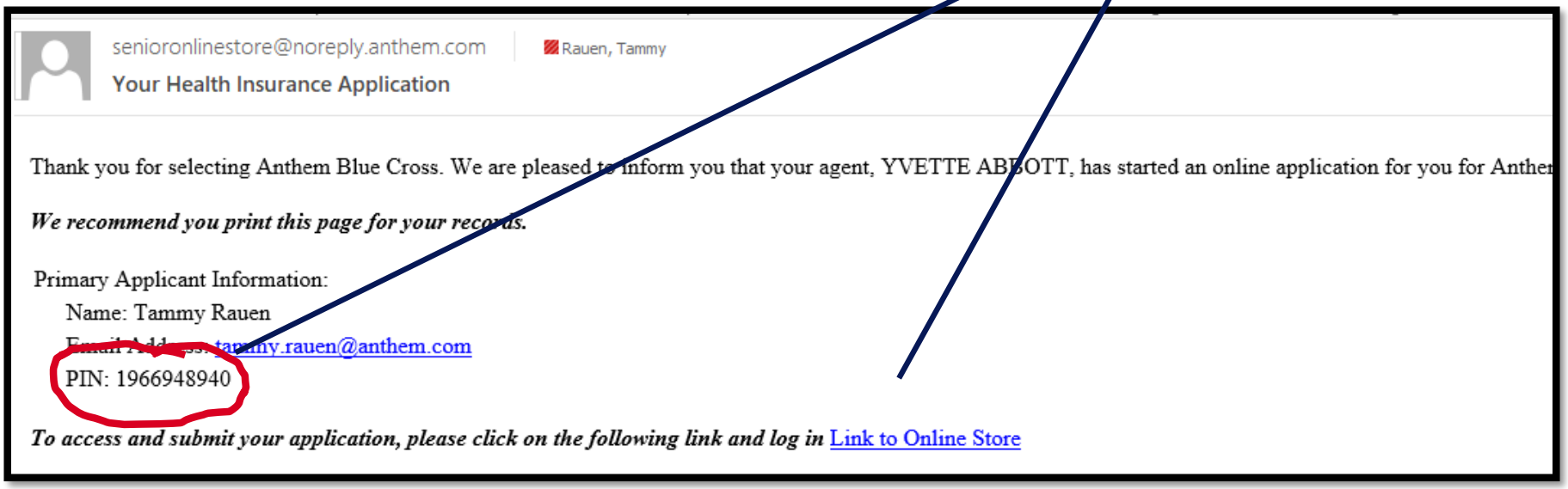


Client Processes the Application

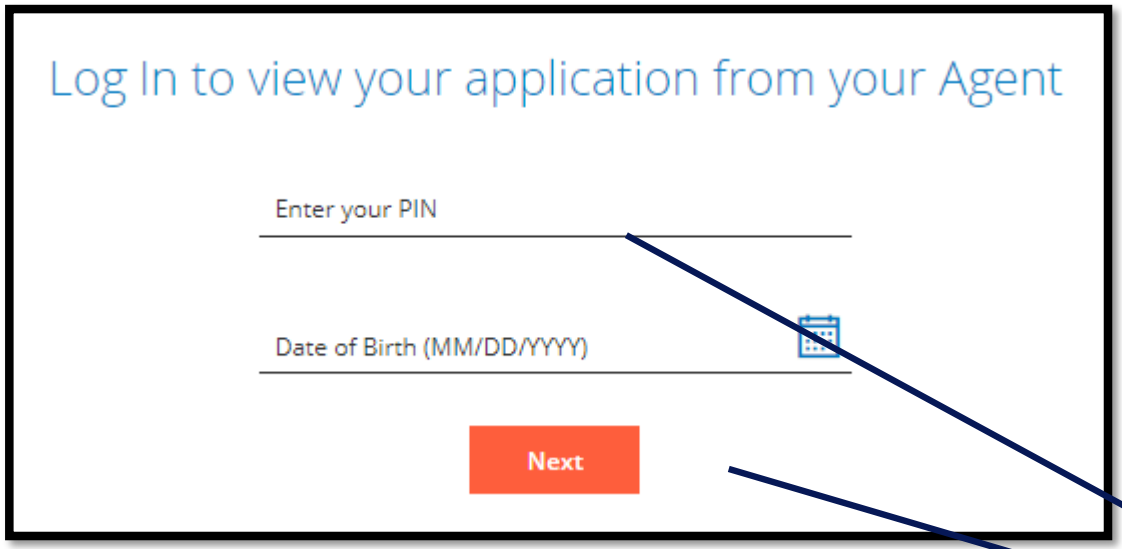
Client Receives an Email

The client will receive an email from senioronlinestore.

The client should copy the PIN to his clipboard.
The client should click on the **Link to Online Store**.



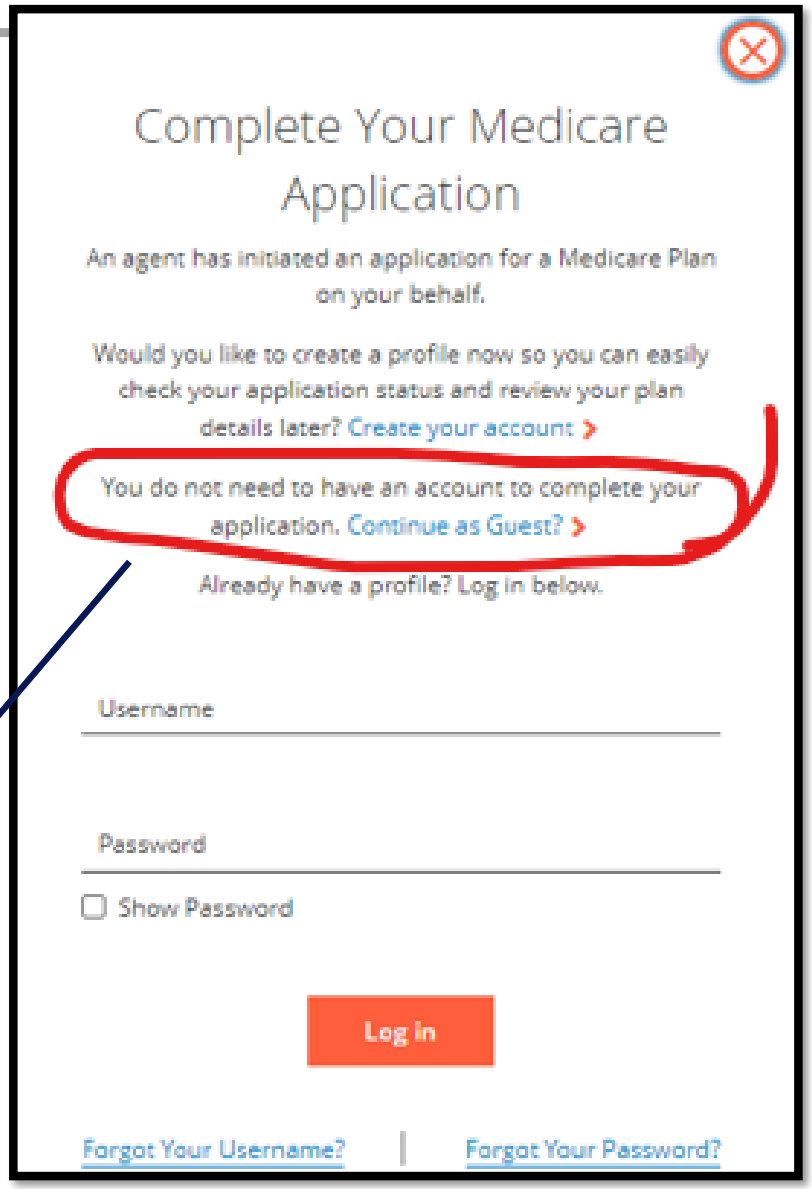
Client Navigates to OLS



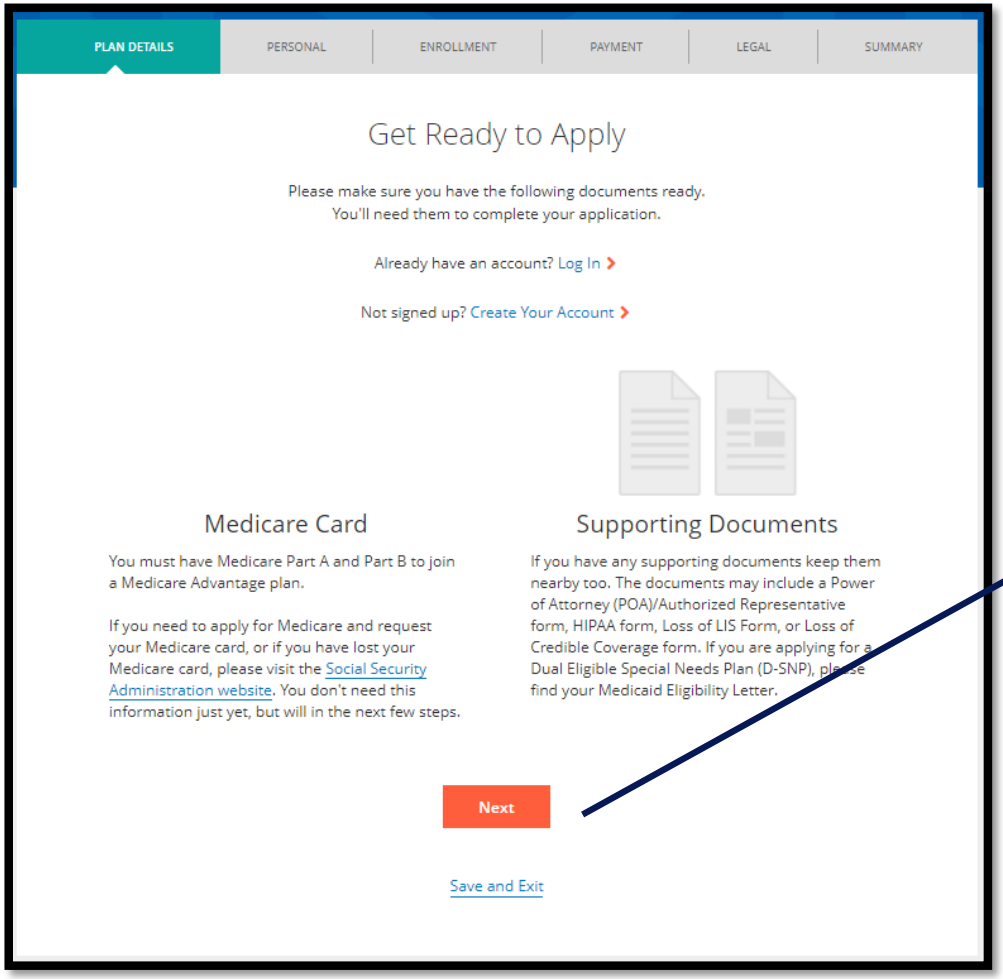
The client should paste the PIN,
enter his date of birth,
and click **Next**.

Create Profile or Continue As Guest

The client can create a user name and password, or just click the **Continue as Guest** link.

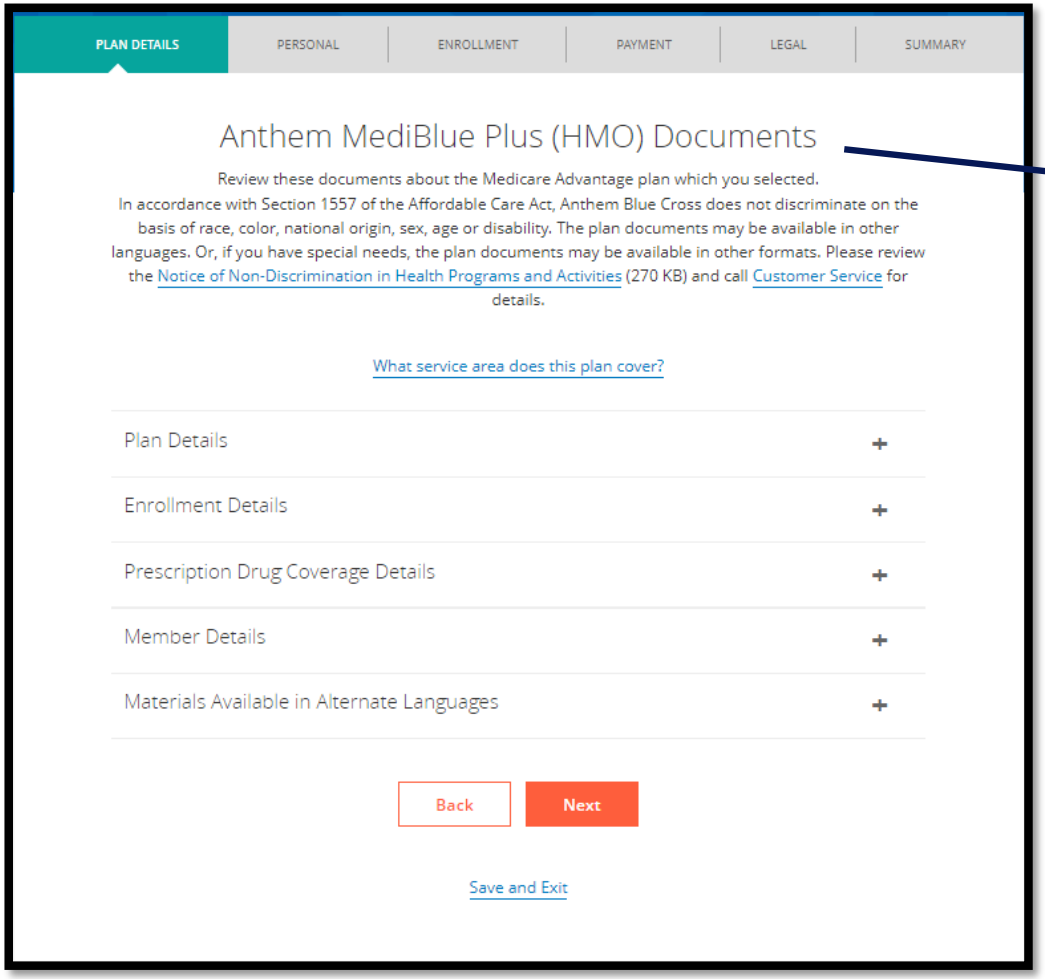


Get Ready to Apply



The client should click **Next**.

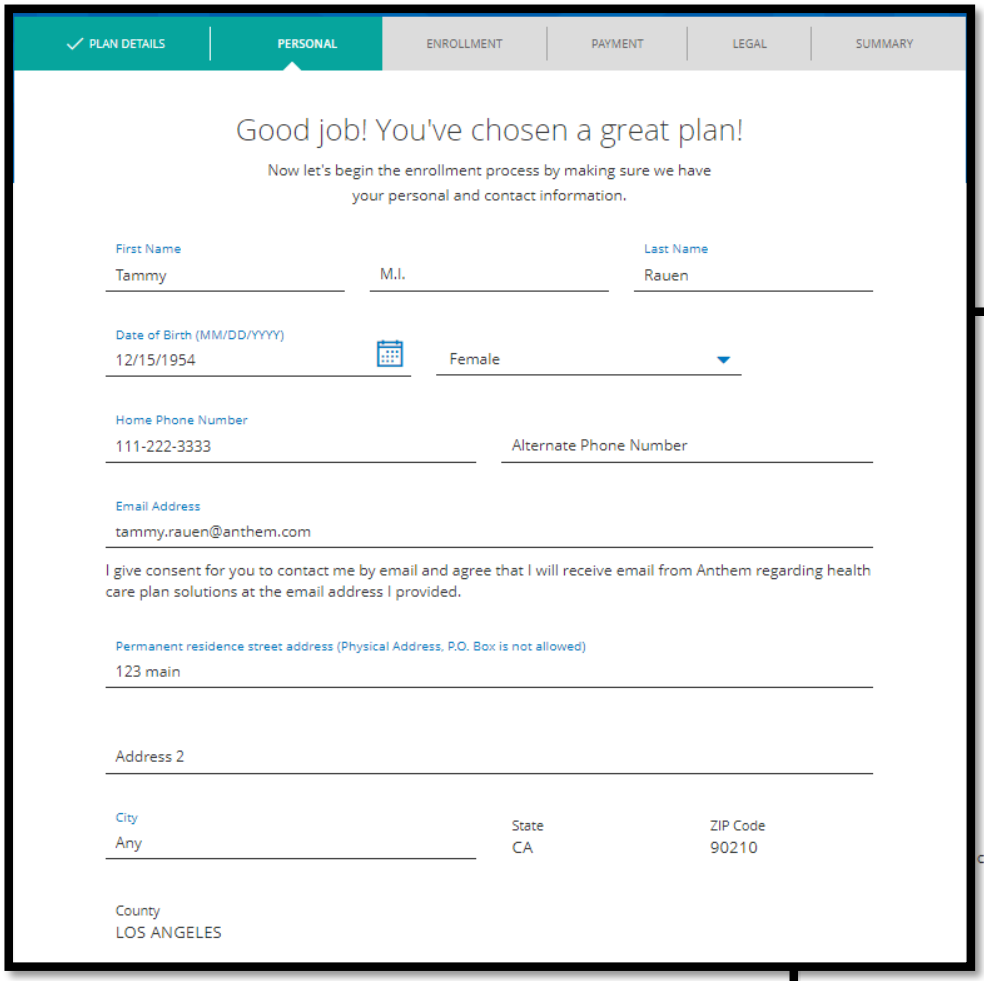
Plan Documents

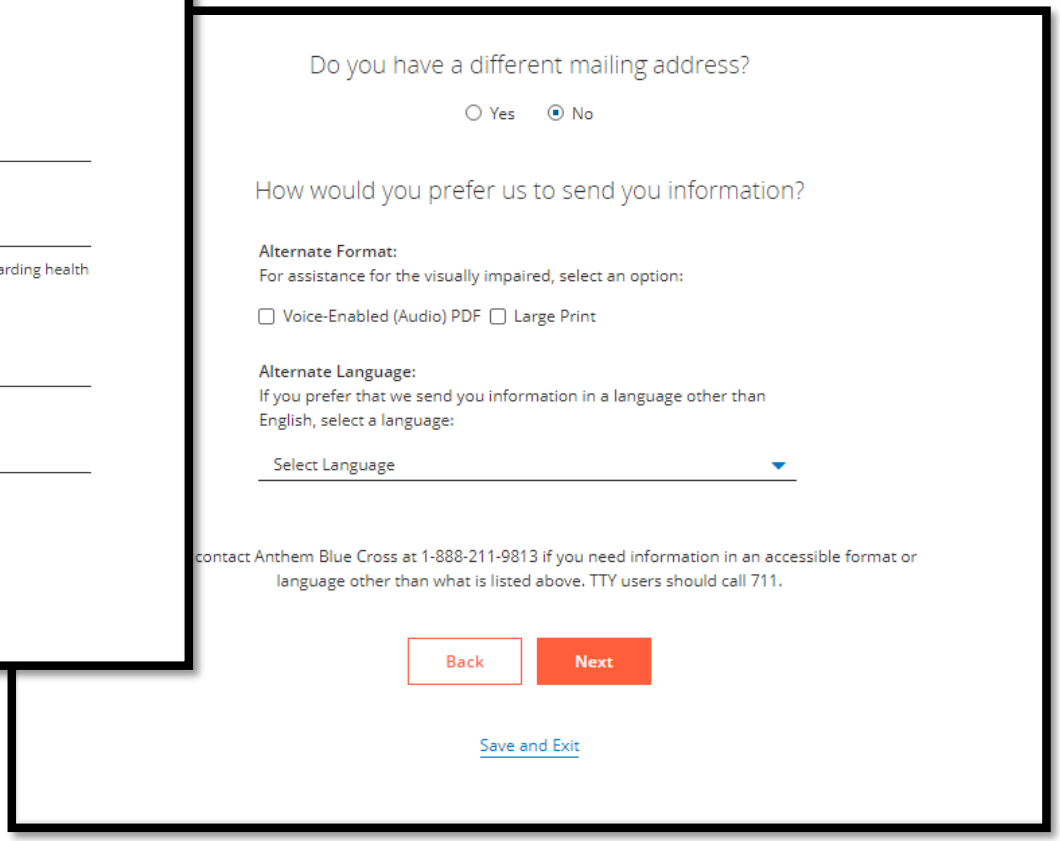


The client should ensure this is the correct plan and click **Next**.

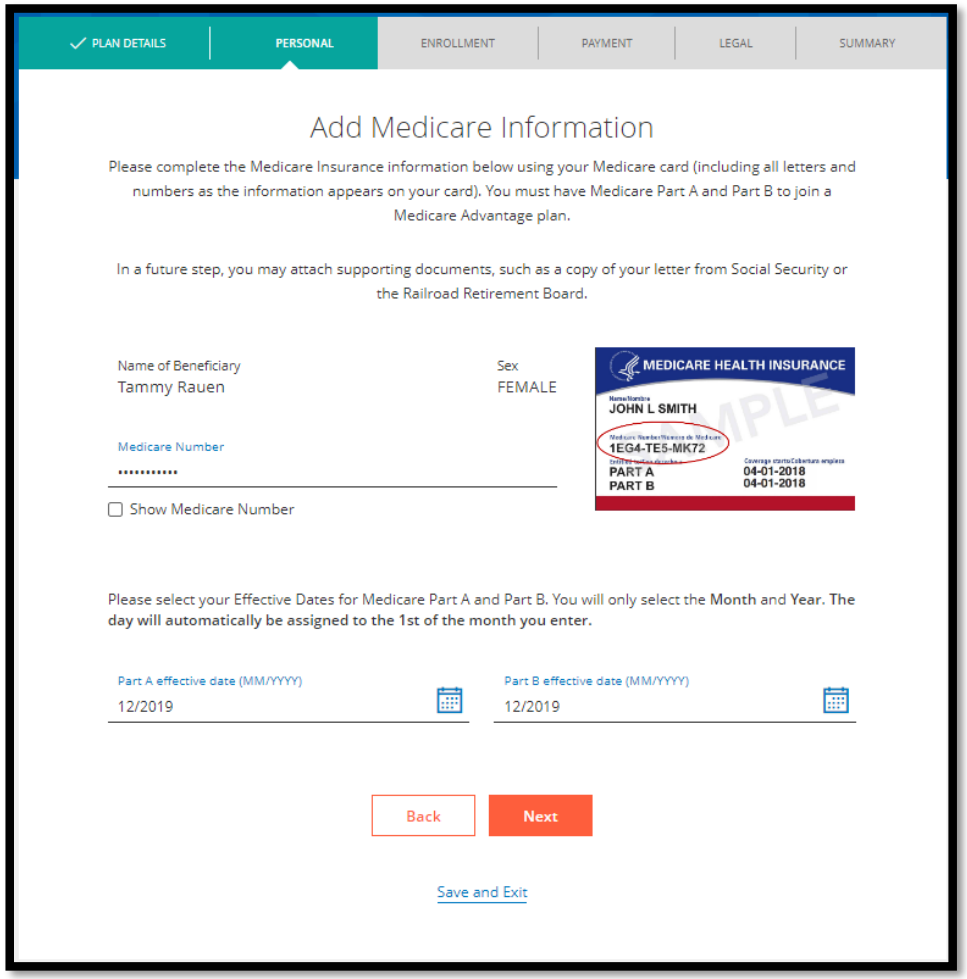
Demographic Information

The client should ensure demographic information is correct, update as needed, and click **Next**.





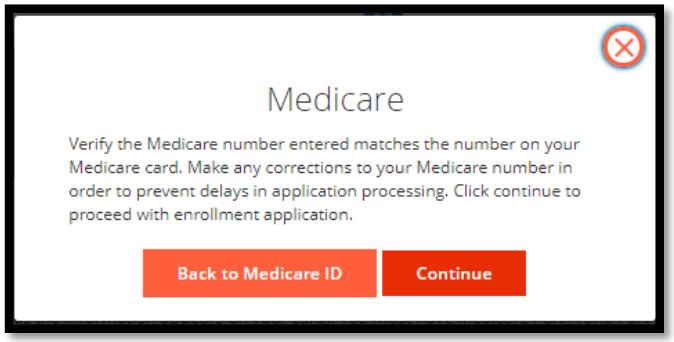
Medicare Information



The client should ensure Medicare information is correct, update as needed, and click **Next**.

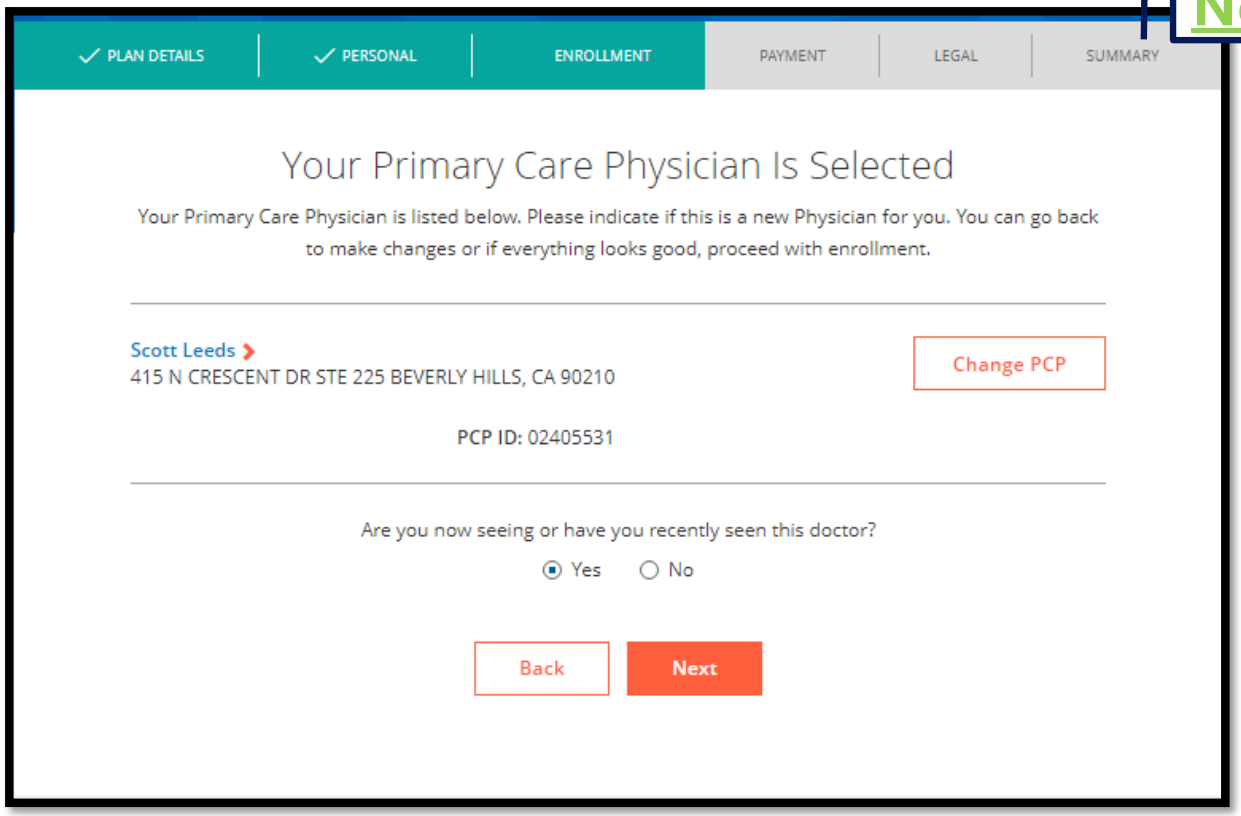
A message appears to remind the client to validate Medicare ID.

- The client should click **Back to Medicare ID** to review if needed.
- The client should click **Continue** to proceed if already reviewed and validated.



PCP

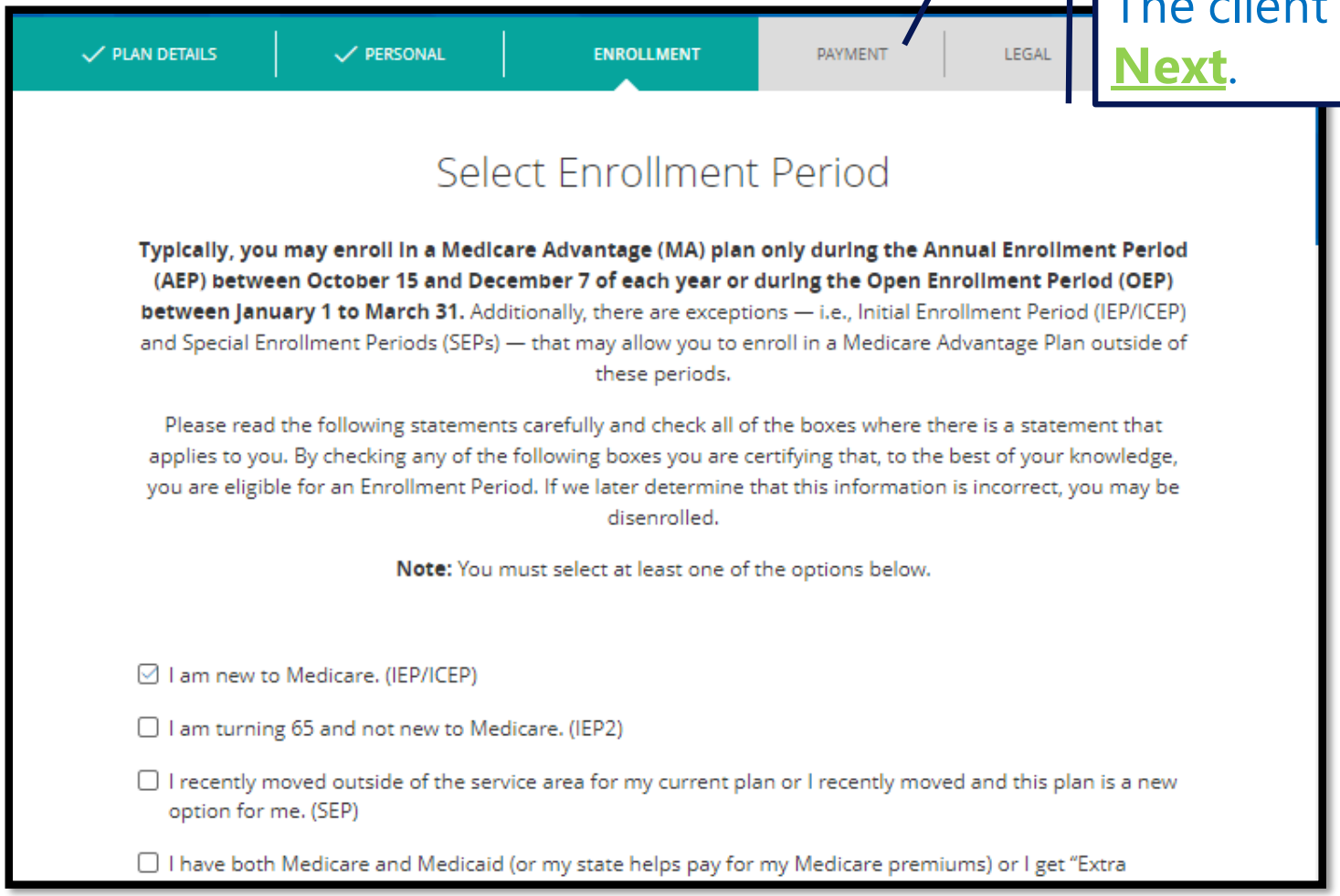
The client should ensure the PCP is correct, update as needed, and click **Next**.



Select Enrollment Period

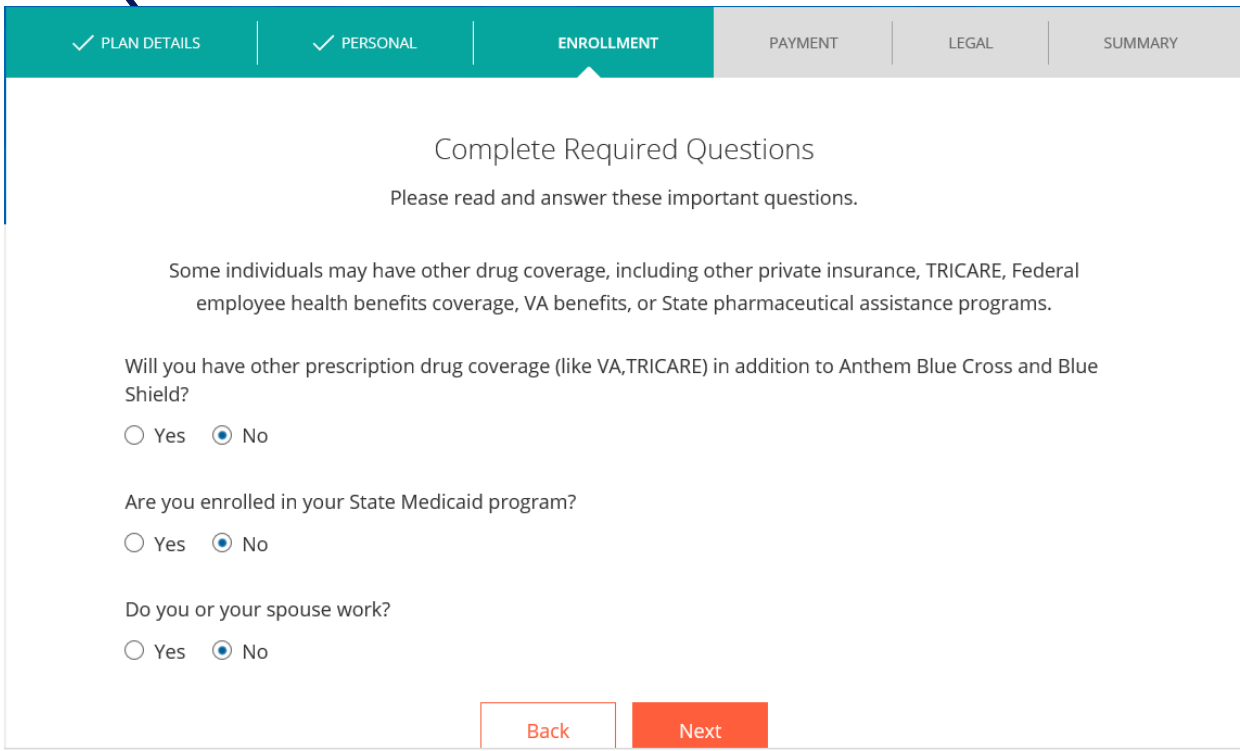
Your agent should have already selected the appropriate SEP.

The client should click **Next**.



Required Questions

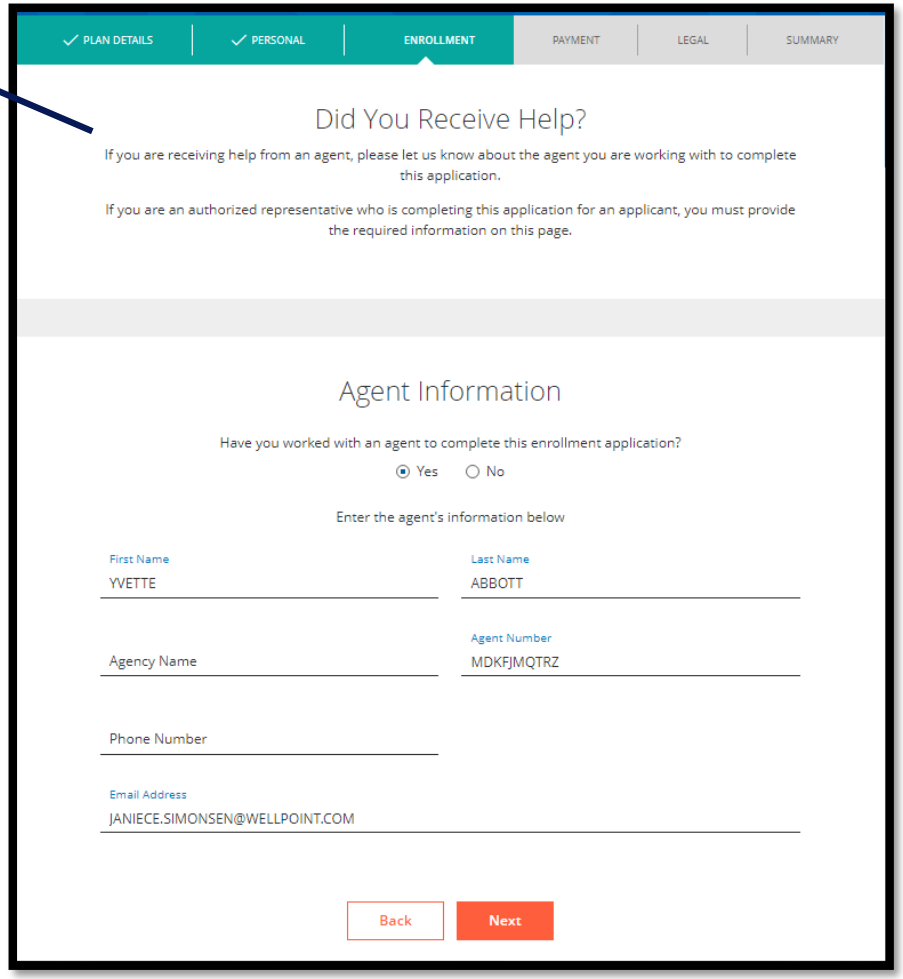
The client should ensure required questions are correct, update as needed, and click **Next**.



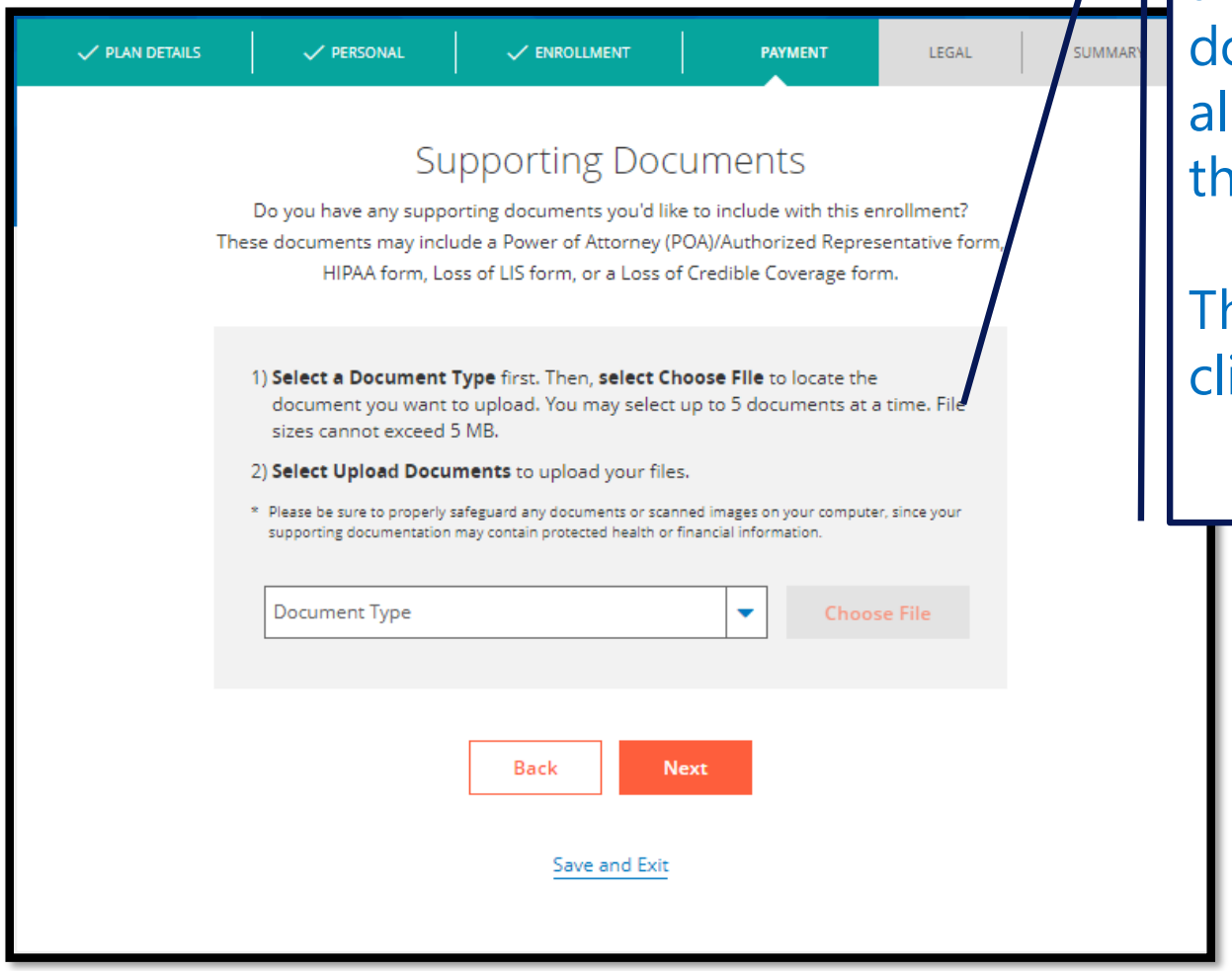
Agent Information

The agent should have already completed the agent information.

The client should click **Next**.



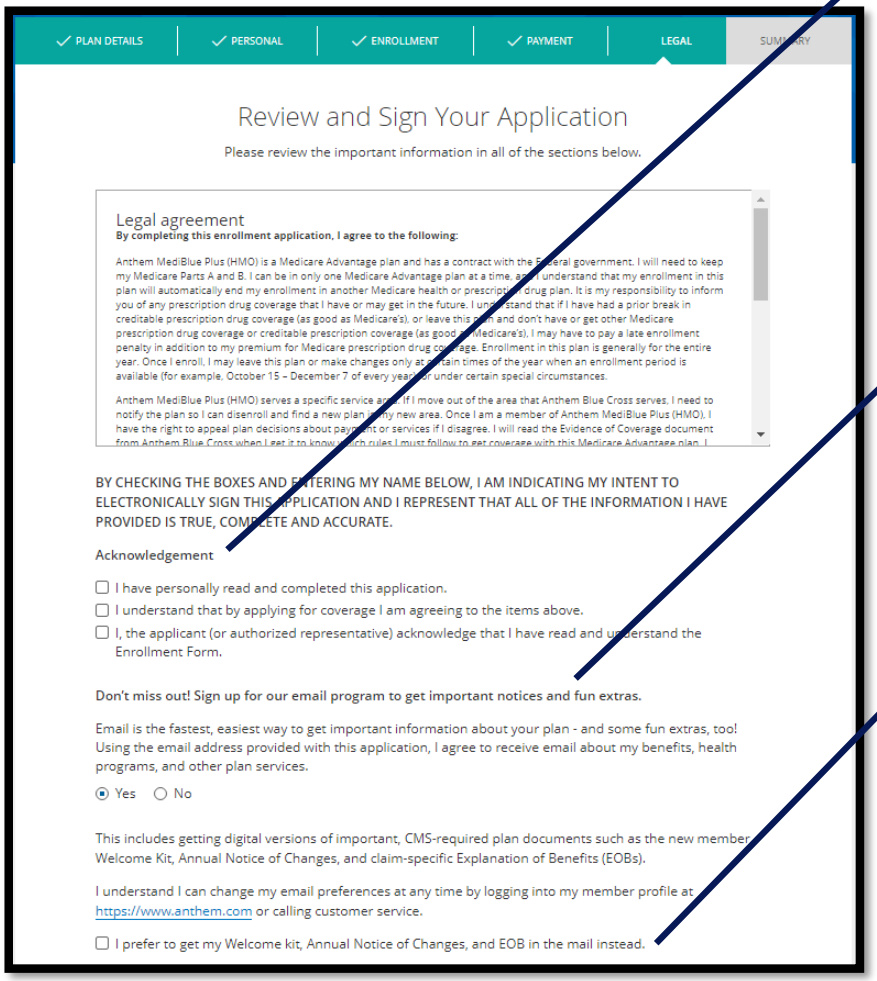
Supporting Docs



The client can upload any required documentation not already uploaded by the agent.

The client should then click **Next**.

Legal/Signature



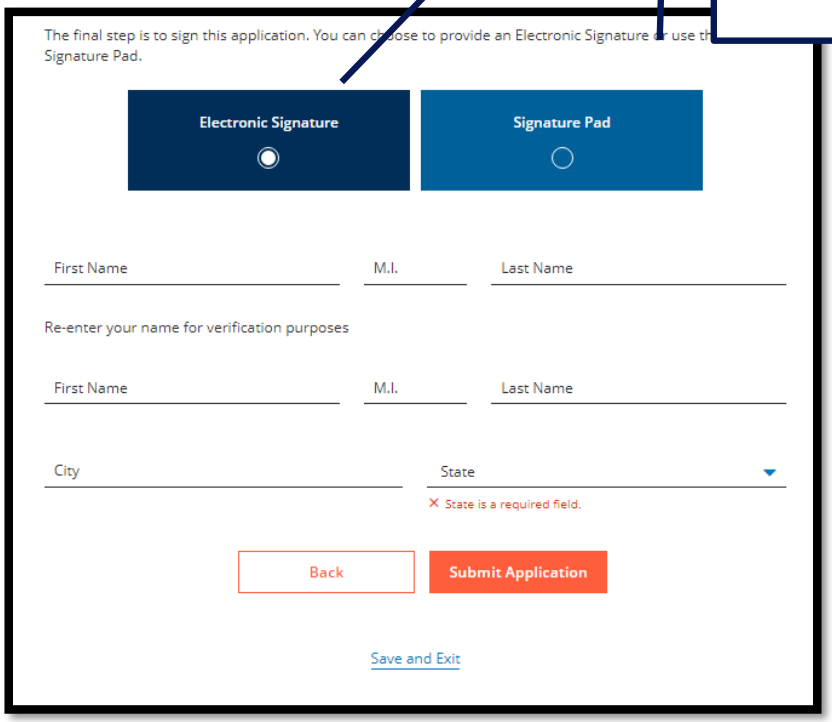
The client should check the boxes in the ***Acknowledgement*** section.

The client should sign up for the email program as desired.

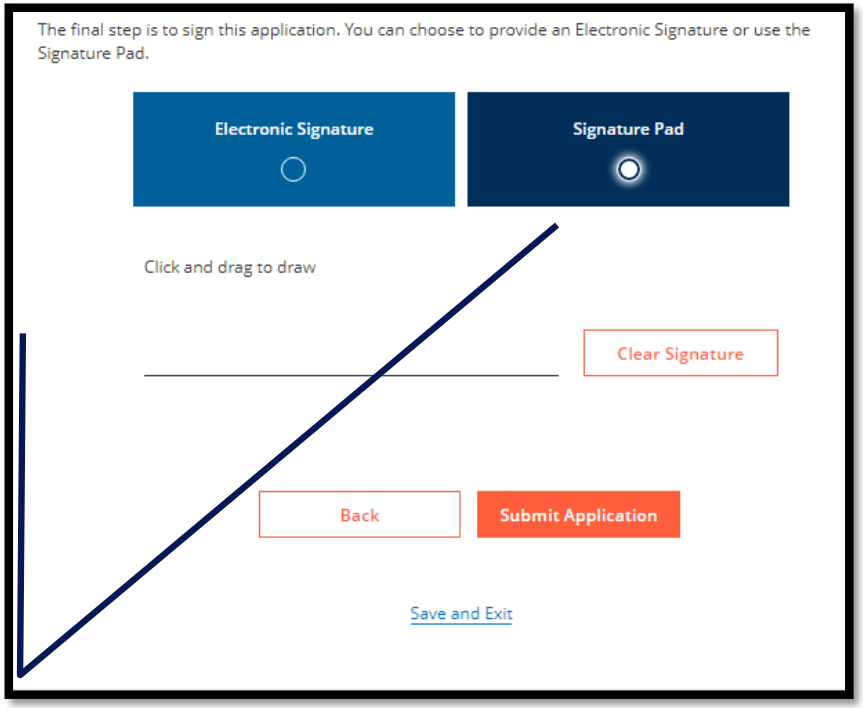
The client should check this box if he prefers to receive certain documentation by mail.

Signature

The client can enter his name two times, his city, and state, and click **Submit Application**.

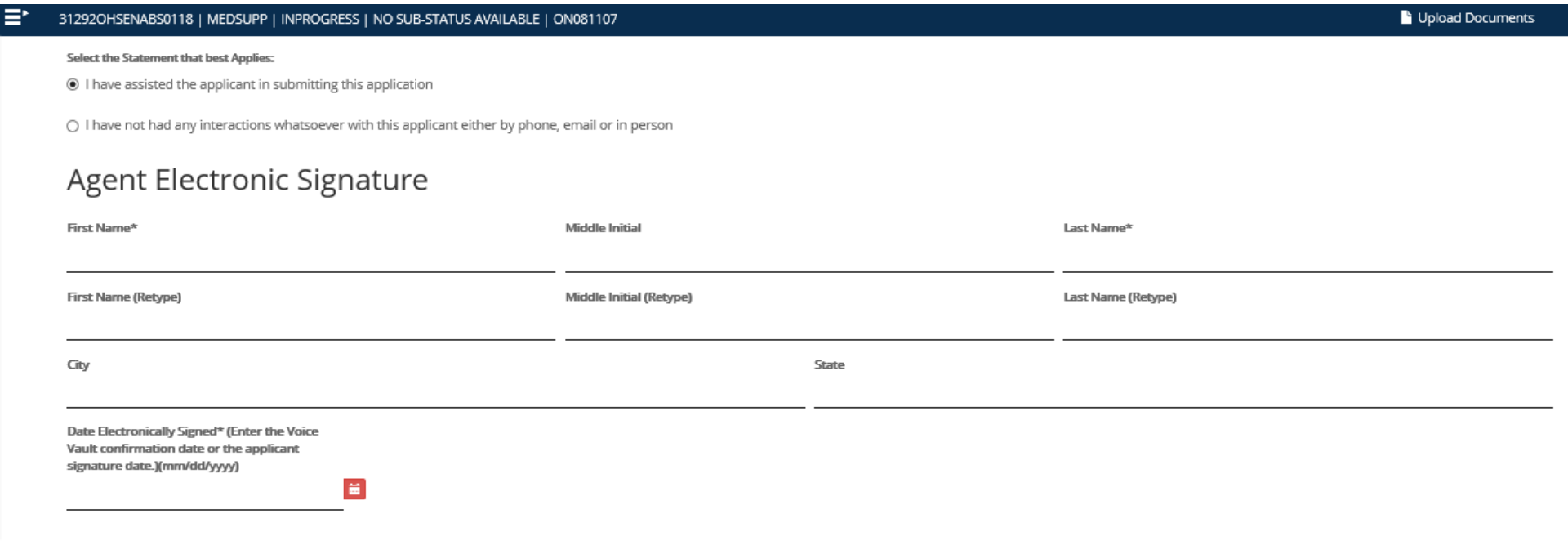


OR



If he prefers to use his mouse, finger, or stylus to sign, the client can click **Signature Pad**, sign, and then click **Submit Application**.

Agent Signature



Eligibility Check

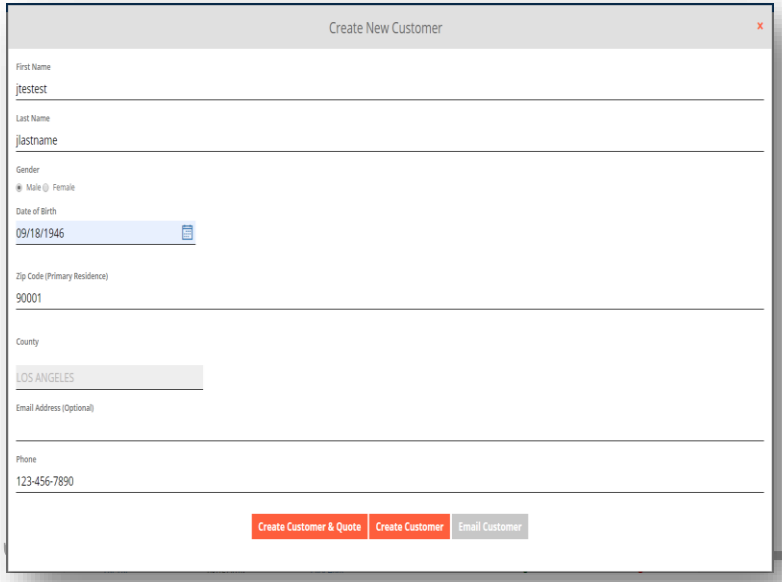
DSNP Verification

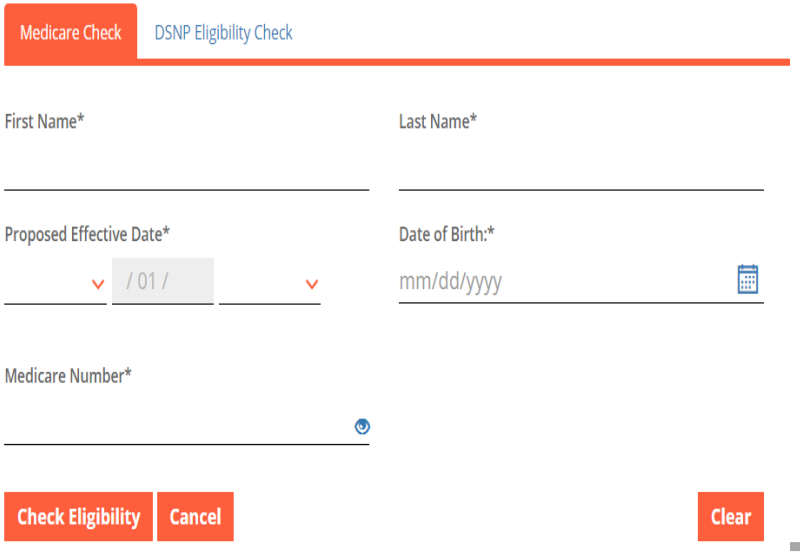
Initiate Eligibility Check from Create Customer & Quote

You can validate DSNP eligibility for a newly created customer.

When you create a customer and click on the **Create Customer & Quote** button, you will be taken to the quote screen. If you quote and click **Apply** for a DSNP plan, you will be prompted to validate DSNP eligibility.

You can perform a check (**Check Eligibility**) or not (**Skip**).



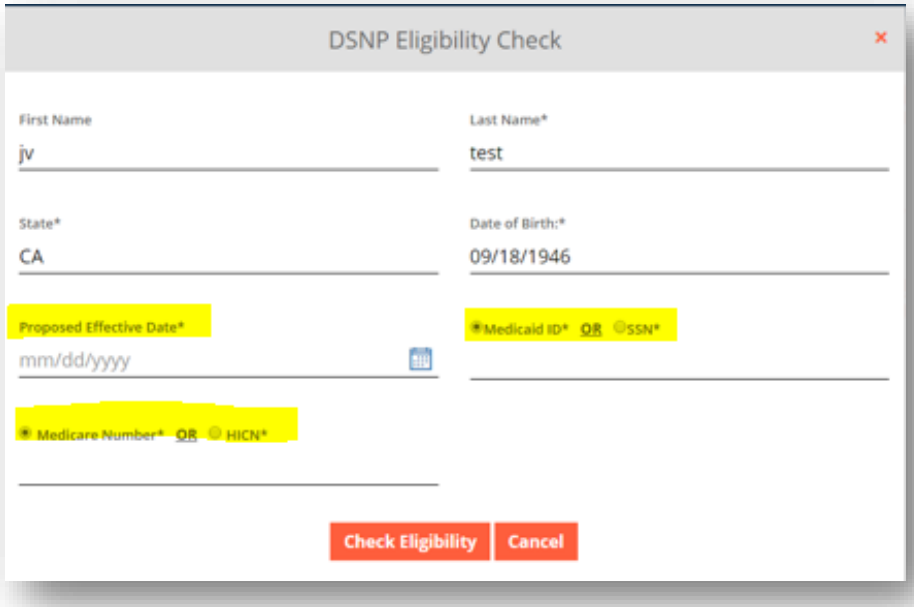


How do I validate DSNP Eligibility?

All fields are required to validate DSNP eligibility.

- Customer fields will be pre-populated.
- Enter:
  - Proposed Effective Date
  - Medicaid ID or SSN
  - Medicare # or HICN

Once the fields are populated, click the **Check Eligibility** button.



DVT Validation Line *

Phone #: 844-274-6355

Email: medicaideligibility@anthem.com

Period	Monday – Friday	Saturday (DSNP Validation ONLY)
Lock-In	8:30 AM – 8:00 PM EST	• Last 2 Saturdays of Month • 9:00 AM – 5:30 PM EST
AEP	8:30 AM – 8:00 PM EST	• Every Saturday • 9:00 AM – 5:30 PM EST

* Except company holidays

thank you!