

## Quick Reference Guide

### ACCESSING THE TOOL:

- 1 | Enter the following URL in your search bar <https://mproducer.anthem.com>
- 2 | Log into the website using your existing **Producer Toolbox** credentials

### FIND YOUR PLANS:

- 1 | Tap on the **Quoting** tile
- 2 | Enter the required demographic information under Find your Plans
- 3 | Tap **Get Plans**


### ENROLL IN A PLAN:

- 1 | Find desired plan under Plan Details and Tap **Apply**
- 2 | If **Additional Coverage options** appear, select one and confirm **Total Monthly Premium** updates - If there are not any additional coverage options proceed to Tap **Select Agent**
- 3 | Select from each drop down:  
Parent Agent/General Agency, Paid Agent/Agency, & Writing Agent
- 4 | Tap **Customer Details**
- 5 | Complete fields in **Customer Details** window
- 6 | Tap **Enroll Now**

### UPLOADING SUPPORTING DOCUMENTS:

- 1 | Tap on **Upload Documents**
- 2 | Select the **type of document** from the drop down
- 3 | Tap on **Choose File** to select file and Tap **Open**
- 4 | Tap **Upload** and message appears successfully uploaded, **Close window**  
\*Scope of Appointment forms cannot be uploaded here, please see Attach SOA/eSOA


### OTHER HELPFUL HINTS and REMINDERS:

- 1 | Clear Browsing Data or Temporary Internet File Often – Your web browser stores older page content and may ignore fresh content from websites.
- 2 | Ensure Pop-Up Blockers are turned off.
- 3 | If you take an electronic SOA, you do not have to print or fax it to the SOA department for archiving.
- 4 | If you took a paper SOA and want to upload it to the electronic application using the device, take one picture of the two page SOA laid side-by-side.
- 5 | Applications created using mProducer must be submitted using mProducer. Users will not be able to start an application in mProducer, and complete the application using Agent Data Entry.
- 6 | Use the Stacked Menu bar (top left) to navigate throughout the tool at any time. 

### CAPTURE THE eSOA PRE-APPOINTMENT:

- 1 | From the dashboard Tap on the **Scope of Appointment** tile
- 2 | Tap the **Create a New SOA** button to navigate to a new eSOA form
- 3 | Have the beneficiary initial the plan(s) he wants to review and sign the eSOA using his finger or stylus
- 4 | Sign the eSOA and tap the **Save** button (Status is **Initiated**)

### COMPLETE THE eSOA POST-APPOINTMENT:

- 1 | From the dashboard Tap on the **Scope of Appointment** tile
- 2 | Select the Initiated SOA and tap the **Edit** icon 
- 3 | Tap the checkbox next to the plans you discussed, enter the **DATE APPOINTMENT COMPLETED**, and tap the **Update** button (Status is **Complete**)

### ATTACH THE eSOA TO THE APPLICATION:

- 1 | From within the application, tap the **Upload SOA** button
- 2 | Select **Electronic SOA**
- 3 | Select the appropriate SOA from the list of **Completed** eSOA's to get an orange checkmark
- 4 | Select the **Upload** button

\*Only **Completed** eSOA's can be uploaded to an application. If you have not completed the eSOA, you'll need to do so before you can upload it.

### ATTACH THE PAPER SOA TO THE APPLICATION:

- 1 | From within the application, tap the **Upload SOA** button
- 2 | Select **Scanned SOA**
- 3 | Tap on the **Choose File** button and select a **file** or **take a Photo**
- 4 | Select the **Upload** button