

# mProducer – w/eSOA & Transfer to Customer Option



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***Verify Eligibility***

Phone: (844) 274-6355

[medicaideligibility@anthem.com](mailto:medicaideligibility@anthem.com)

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# mProducer – Anthem’s Online Enrollment Tool

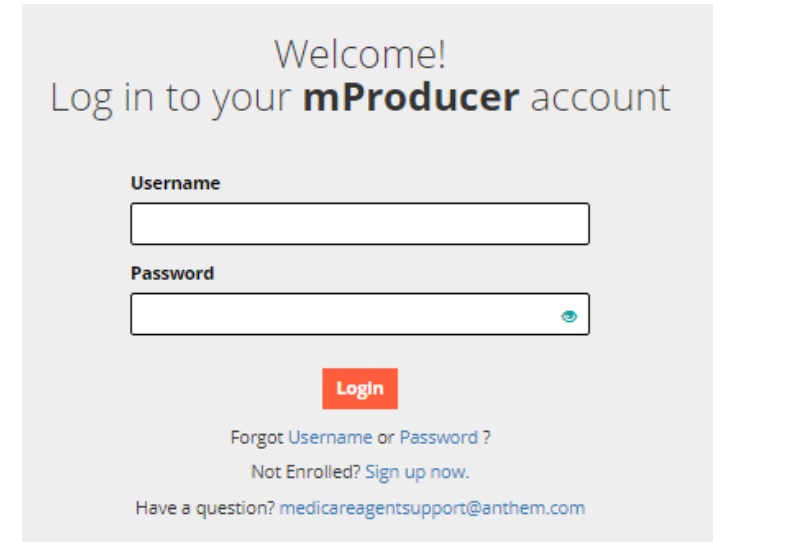
## How do I access mProducer?

You can access mProducer directly at:

<https://mproducer.anthem.com/mproducer/public/login>

You can also access mProducer via the Producer Tool Box at:

<https://brokerportal.anthem.com/apps/ptb/login>



Welcome!  
Log in to your **mProducer** account

Username

Password

[Login](#)

[Forgot Username or Password ?](#)  
[Not Enrolled? Sign up now.](#)  
Have a question? [medicareagentsupport@anthem.com](mailto:medicareagentsupport@anthem.com)

[Producer Toolbox](#)

Login or register to get the latest information about COVID-19.

Registered Brokers Log in Here

Not signed up? [Register now](#) >

Username

Password

[Log In](#)



# mProducer Dashboard

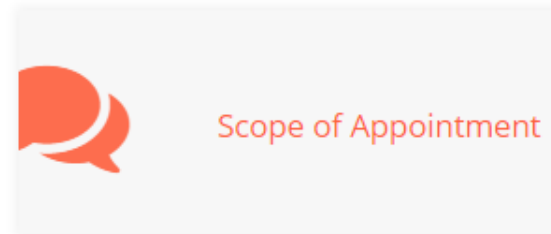
- The dashboard has a set of tiles that gives you access to the tools you will need for your enrollments.  
(SOA, Eligibility Verification & Quoting/Application)

Check here for updates on this tool and more! (iPads touch here for scrollbar)

[Online DSNP validation](#) is available for [California](#) in mProducer effective [1/26!](#)

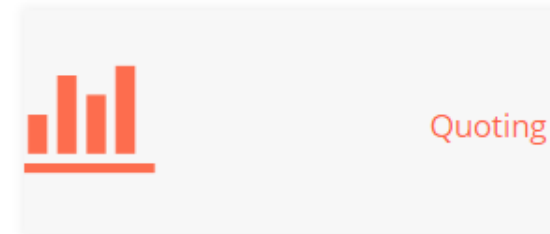
1. Complete SOA

Create New Electronic SOA



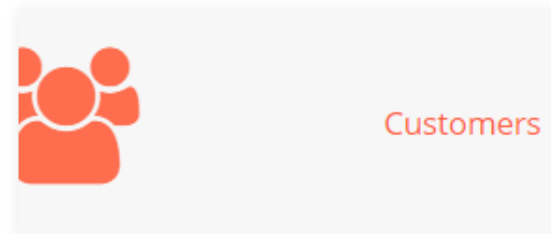
Scope of Appointment

This tile features a red speech bubble icon on the left and the text "Scope of Appointment" in the center.



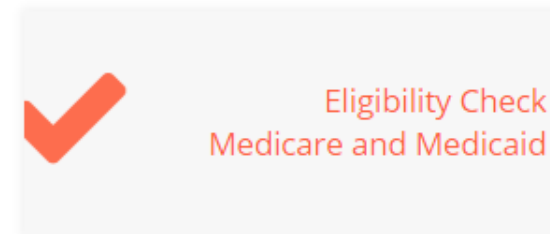
Quoting

This tile features a red bar chart icon on the left and the text "Quoting" in the center.



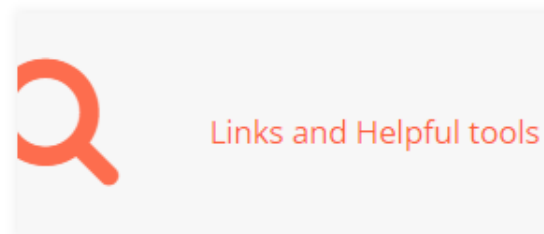
Customers

This tile features a red icon of three people on the left and the text "Customers" in the center.



Eligibility Check  
Medicare and Medicaid

This tile features a red checkmark icon on the left and the text "Eligibility Check Medicare and Medicaid" in the center.



Links and Helpful tools

This tile features a red magnifying glass icon on the left and the text "Links and Helpful tools" in the center.

3. Start Application

2. Check Medicare & Medicaid Eligibility

# mProducer SOA

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

Agent Name

Ishakeyra Serrano

Agent Phone

562-658-9108

Beneficiary Name

Walt Disney

Beneficiary Phone (Optional)

562-888-9999

Beneficiary Address (Optional)

123 Disney Dr Disney Land CA 00000

Medicare ID Number



Initial Method/Location of Contact

Referral

Indicate here if beneficiary was a walk-in.

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

Fill out section above ONLY and click on Transfer to Bene to eSign

# mProducer Agent to send SOA

## Transfer eSOA to Beneficiary



Customer's email ID

ishakeyra.serrano@anthem.com

Customer provided 4-digit PIN

1234

Automated transfer emails are occasionally identified as Spam or Junk mail. Please ask the shopper to check Spam or Junk mail folder if they don't see an email from us.

Additional Information

Use this space to provide additional information in the email to your customer. Text entered in this box will only appear on this email notification to be retained.

Please call me with questions...

Max 2000 characters

Cancel

Send eSOA



# mProducer Email to Client



senioronlinestore@noreply.anthem.com

Serrano, Ishakeyra

Sat

Your Medicare Scope of Appointment

Your agent, Ishakeyra Serrano, has started an electronic scope of appointment for you.

*Notice from agent:* Please sign SCOPE of appointment. Please call me with questions.

To access your scope of appointment, please click on the following link <https://shop.anthem.com/medicare/my-esoa/enterpin?esoa-pin=5322>

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.

Access your Scope of appointment

## Customer Information

Name: Rene Polanco

Email Address: [ishakeyra.serrano@anthem.com](mailto:ishakeyra.serrano@anthem.com)

PIN: 4 digit pin you provided to the agent.

Enter your PIN

Enter your email address

Link opened

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

Next

Ishakeyra Serrano

Link to SCOPE





# mProducer Client Signs SOA

## 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 \_\_\_\_\_

Clear

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.

Submit & Transfer Back to Agent

Thank You!

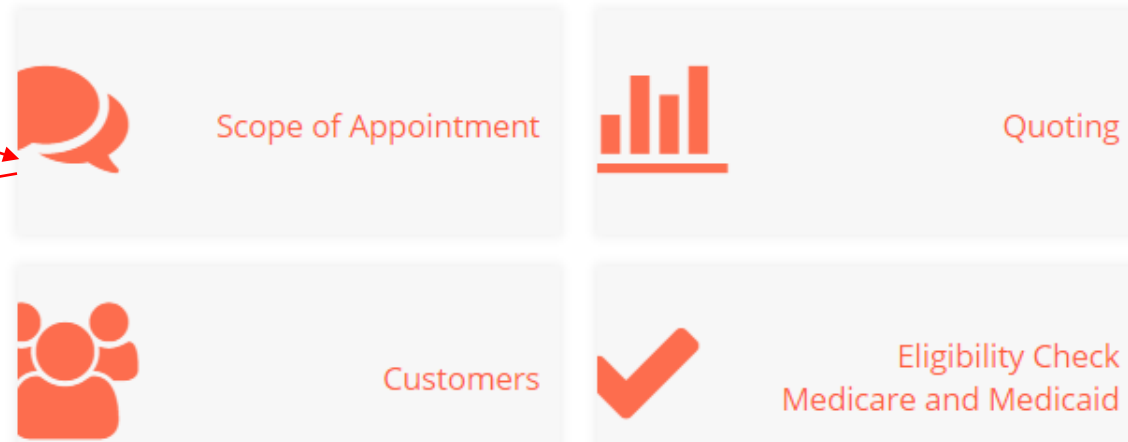
Your portion of scope of appointment form is complete. Your agent may now proceed to discuss the products you selected in your upcoming appointment.

# mProducer SOA Agent Completion

Check here for updates on this tool and more! (IPads touch here for scrollbar)

[Online DSNP validation is available for California in mProducer effective 1/26!](#)

Go back in to SOA



Scope of Appointment

Quoting

Customers

Eligibility Check Medicare and Medicaid

Electronic SOA List

## Electronic Scope of Appointments List


[Back to SOA](#)

Search Beneficiary

Status Type

All



BENEFICIARY NAME	PHONE	MEDICARE ID	CREATE DATE	STATUS	
Walt disney			2020-04-14	eSign Received	

# mProducer SOA Agent Completion

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

Plan(s) the agent represented during this meeting

PDP  MA/MAPD

Date Appointment Completed

mm/dd/yyyy



Today

Clear

Plan Use Only

Agent's Signature

Clear

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

UPDATE

Transfer to Bene to eSign

# mProducer SOA Agent Completion

Success! Your SOA is saved successfully.

## Electronic Scope of Appointments List

[Back to SOA](#)

Search Beneficiary

Status Type

---

All



BENEFICIARY NAME	PHONE	MEDICARE ID	CREATE DATE	STATUS
Walt disney			2020-04-14	Completed

# mProducer Dashboard

Check here for updates on this tool and more! (iPads touch here for scrollbar)

[Online DSNP validation is available for California in mProducer effective 1/26!](#)

The dashboard features five main menu items arranged in a grid:

- Scope of Appointment**: Represented by a speech bubble icon.
- Quoting**: Represented by a bar chart icon.
- Customers**: Represented by an icon of three people.
- Eligibility Check Medicare and Medicaid**: Represented by a checkmark icon.
- Links and Helpful tools**: Represented by a magnifying glass icon.

3. Start Application



2. Check Medicare & Medicaid Eligibility



# mProducer Quoting



## Find your plans

Coverage Begins

05 / 01 / 2020

Zip Code

Date of Birth  
mm/dd/yyyy

Gender

Male  Female

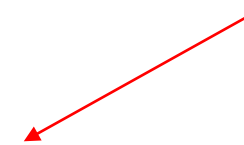
Get Plans

Desired Effective Date

Customer Zip Code

Customer DOB

Customer Gender



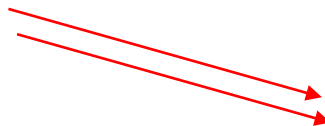


# mProducer Quoting

## Plan Details

Plan Name	Plan Description	Monthly Premium	
<b>Anthem MediBlue Heart (HMO C-SNP)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Heart (HMO C-SNP) is a Health Maintenance Organization plan with a Medicare contract. This plan is designed exclusively for the needs of any Medicare beneficiary who has been diagnosed with cardiovascular disorders including chronic heart failure. You must have been diagnosed by your doctor with cardiovascular disorders and chronic heart failure to be eligible to join this plan.	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue ESRD (HMO C-SNP)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue ESRD (HMO C-SNP) is a Health Maintenance Organization plan with a Medicare contract. This plan is designed exclusively for the needs of any Medicare beneficiary who has been diagnosed by their doctor with end-stage renal disease requiring dialysis (any mode of dialysis).	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue Plus (HMO)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Plus (HMO) is a Medicare Advantage Health Maintenance Organization plan with a Medicare contract.	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue Connect (HMO D-SNP)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Connect (HMO D-SNP) is a Health Maintenance Organization plan with a Medicare contract. This plan is designed to meet the specialized needs of people who have both Medicare Parts A and B and receive full cost sharing assistance from the state Medicaid program.	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue Select (HMO)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Select (HMO) is a Medicare Advantage Health Maintenance Organization plan with a Medicare contract.	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue Value Plus (HMO)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Value Plus (HMO) is a Health Maintenance Organization plan with a Medicare contract. This is a general enrollment plan.	\$0.00	<a href="#">Apply</a>

Click on either to get PDF of Summary of Benefit and send to client



# mProducer Quoting

## Plan Details

Plan Name	Plan Description	Monthly Premium	
<b>Anthem MediBlue Heart (HMO C-SNP)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Heart (HMO C-SNP) is a Health Maintenance Organization plan with a Medicare contract. This plan is designed exclusively for the needs of any Medicare beneficiary who has been diagnosed with cardiovascular disorders including chronic heart failure. You must have been diagnosed by your doctor with cardiovascular disorders and chronic heart failure to be eligible to join this plan.	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue ESRD (HMO C-SNP)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue ESRD (HMO C-SNP) is a Health Maintenance Organization plan with a Medicare contract. This plan is designed exclusively for the needs of any Medicare beneficiary who has been diagnosed by their doctor with end-stage renal disease requiring dialysis (any mode of dialysis).	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue Plus (HMO)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Plus (HMO) is a Medicare Advantage Health Maintenance Organization plan with a Medicare contract.	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue Connect (HMO D-SNP)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Connect (HMO D-SNP) is a Health Maintenance Organization plan with a Medicare contract. This plan is designed to meet the specialized needs of people who have both Medicare Parts A and B and receive full cost sharing assistance from the state Medicaid program.	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue Select (HMO)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Select (HMO) is a Medicare Advantage Health Maintenance Organization plan with a Medicare contract.	\$0.00	<a href="#">Apply</a>
<b>Anthem MediBlue Value Plus (HMO)</b> <a href="#">Benefit Summary</a> <a href="#">Plan Documents</a>	Anthem MediBlue Value Plus (HMO) is a Health Maintenance Organization plan with a Medicare contract. This is a general enrollment plan.	\$0.00	<a href="#">Apply</a>

Select apply on desired plan



# mProducer Quoting

Plan Detail



This plan contains additional options.

Select those options you are interested in or continue without selections.

Anthem MediBlue Select (HMO)

Plan Premium **\$0.00**

### Additional Coverage

You have the option of enrolling in Optional Supplemental Benefits up to 90 days after your plan's effective date. The effective date you selected for this plan is listed below under "Coverage Begins".

- No Additional Coverage
- Dental and Vision Package **\$31.00**
- Enhanced Dental and Vision Package **\$51.00**
- Preventive Dental Package **\$12.00**

Total Monthly Premium

**\$0.00**

Coverage Begins: May 2020

Continue

# mProducer Application

Customer Details ✕

First Name

---

Last Name

---

Gender

Male  Female

Date of Birth

06/01/1951

---

Zip Code (Primary Residence)

90604

---

Email Address (Optional)

---

Phone Number

---

Coverage Begins

May 2020

<p>Create and Submit new</p> <p>Electronic application <b>Create Electronic Application</b></p>	<p>Enter data directly from a</p> <p>completed paper application <b>Submit Paper Application</b></p>
---	--

Complete all info  
and click here



# mProducer Complete Application

## Primary Care Physician

**Note:** For HMO plans; if a valid PCP ID is not provided, one will be selected for you.

[Click here to use the Online Store Search tool to look up the Provider's PCP Information.](#)

Need PCP ID?

Provider First Name  Provider MI  Provider Last Name

Primary Medical Group (PMG) name

Provider Address1  City  State  ZipCode

PCP ID# (Please enter the full ID #, including any leading zeros. PCPID should be 8 numeric characters.)

Are you now seeing or have you recently seen this doctor?

Yes  No

Please check one of the boxes below if you would prefer us to send you information in a language other than English or in another format:

Spanish  Chinese  Korean(if available)

Assistance for the visually impaired:

Voice-Enabled (Audio) PDF  Large Print  None

Complete ALL pages of application

< 1 2 3 4 >

Save PDF Transfer to Customer Cancel

# mProducer Complete Application

## Primary Care Phys

**Note:** For HMO plans; if a valid PCP ID is

Click here to use the Online Store Search tool to  
Provider First Name

Primary Medical Group (PMG) name

Provider Address1

PCP ID# (Please enter the full ID #, including

Please check one of the boxes below if you

Spanish  Chinese  Korean(if avail

Assistance for the visually impaired:

Voice-Enabled (Audio) PDF  Large Pr

### Provider Finder

City  State  OR Zip Code

Search Radius  Doctor's Name

1. Enter Search criteria
2. Select desired provider
3. Click "add & close"

Doctor/Address

SEAN W WELSH  
7624 PAINTER AVE STE 100  
WHITTIER, 90602  
Phone Number: 562-945-9333 PCP ID: 07860682  
Medical Group: [Show Details](#)  
Distance: 2.95 miles away

SEAN W WELSH  
7624 PAINTER AVE STE 100  
WHITTIER, 90602

first < 1 > last

< 1 2 3 4 >



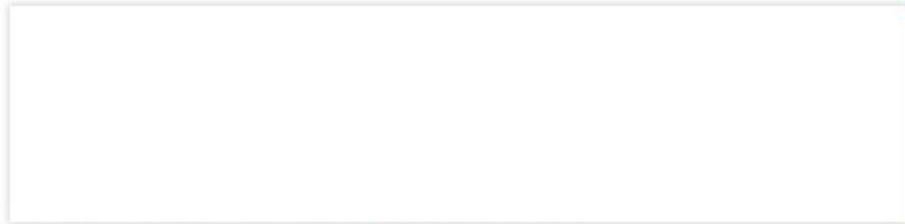
# Applicant Signature

añol

Please select how you would like to capture applicants signature?

- Voice Signature  Paper Application  Signature Pad

Tap on the signature pad to begin to capture the application signature



I have read and agree with the TERMS listed above

- Yes  No

I agree to provide an original application if requested (if applicable)

- Yes  No

Helped Applicant to fill this Application

- Yes  No

# Agent Electronic Signature

First Name\*

Middle Initial

Last Name\*

First Name (Retype)

Middle Initial (Retype)

Last Name (Retype)

City

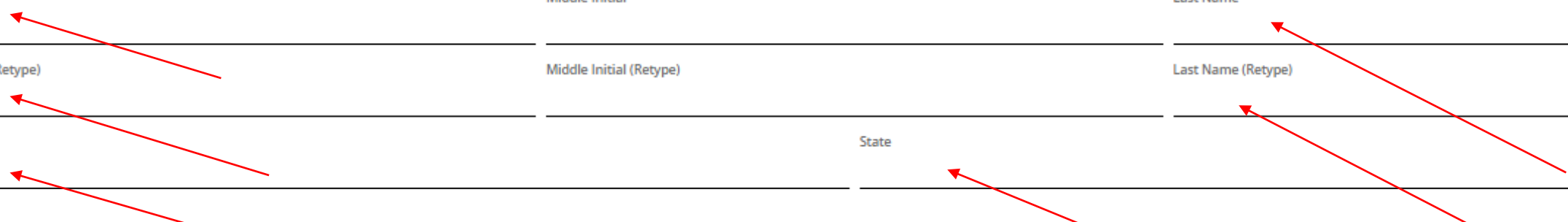
State

Date Electronically Signed\* (Enter the Voice

# mProducer Agent Signature & Submit

## Agent Electronic Signature


First Name*	Middle Initial	Last Name*
First Name (Retype)	Middle Initial (Retype)	Last Name (Retype)
City	State	



Fill out ALL Agent Electronic Signature Section



Upload any required documents  
in top right corner  
& click "Transfer to Customer"



thank you!

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