Mobile Producer
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