



Producer Toolbox Statement Retrieval

Purpose

This detailed guide provides instructions on logging into the Producer Toolbox to retrieve the PDF and Excel Download versions of the broker statements.

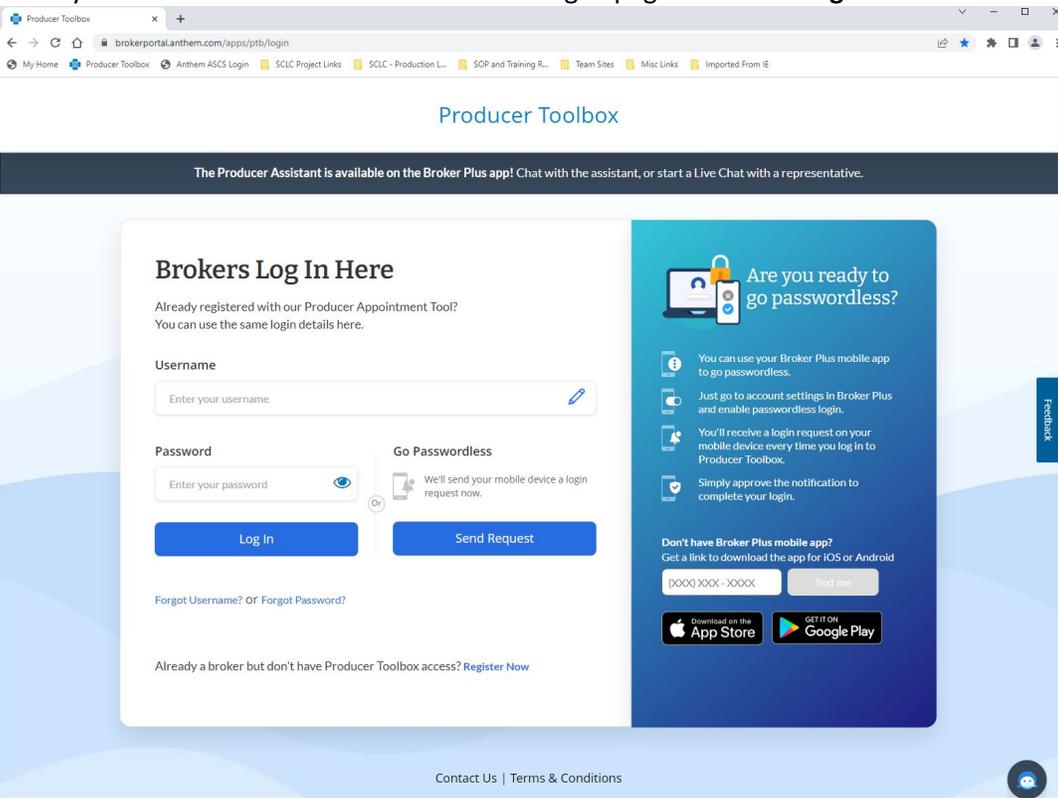
- Medicare business will be paid on a weekly basis.
- Group and Individual business will be paid monthly.

Outline

Statement Section	Page
Logging Into the Producer Toolbox	2
Access PDF and CSV Broker Commission Statements	3
Commissions Earned and Commission Summary	7

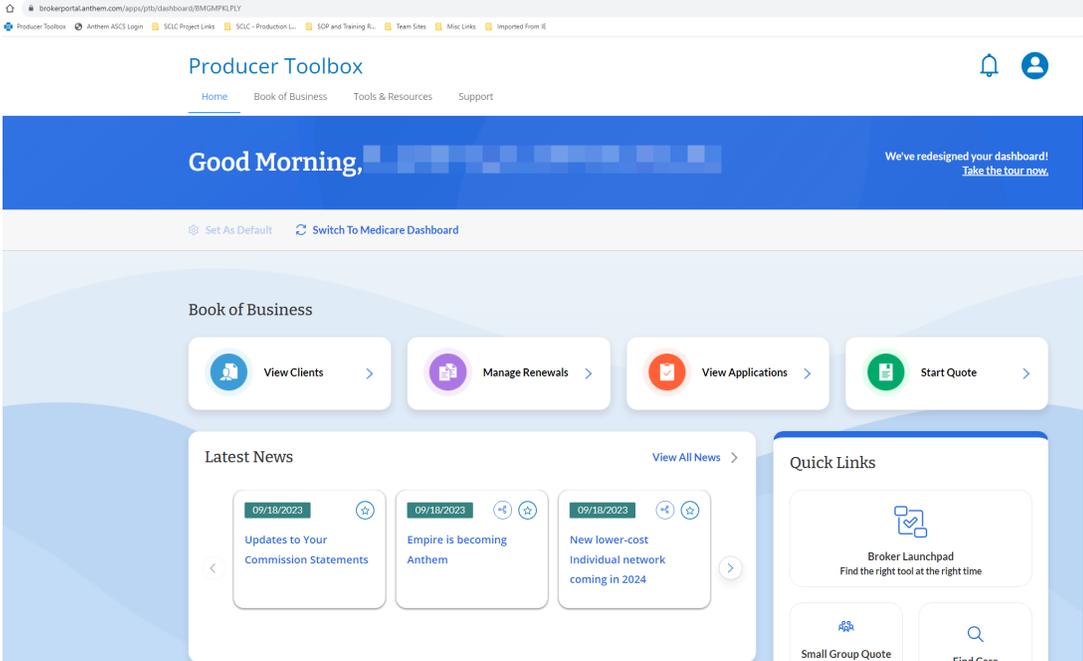
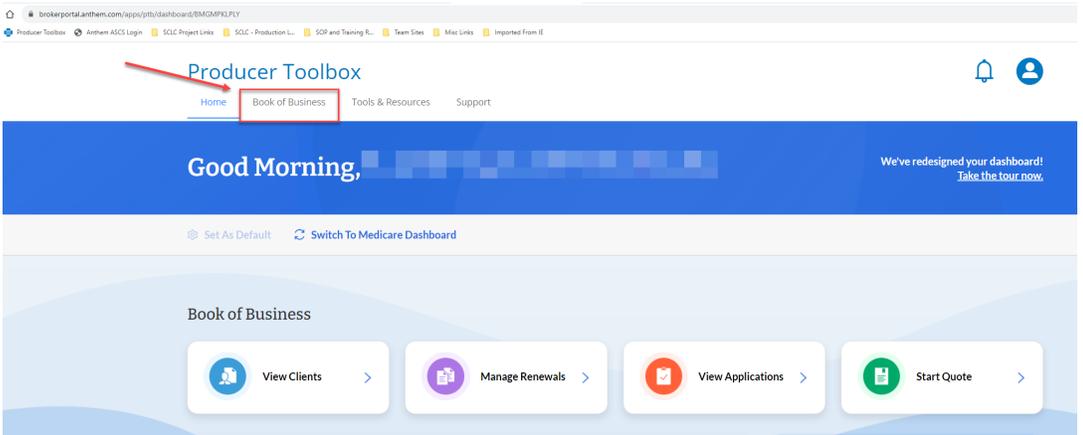
Logging into the Producer Toolbox

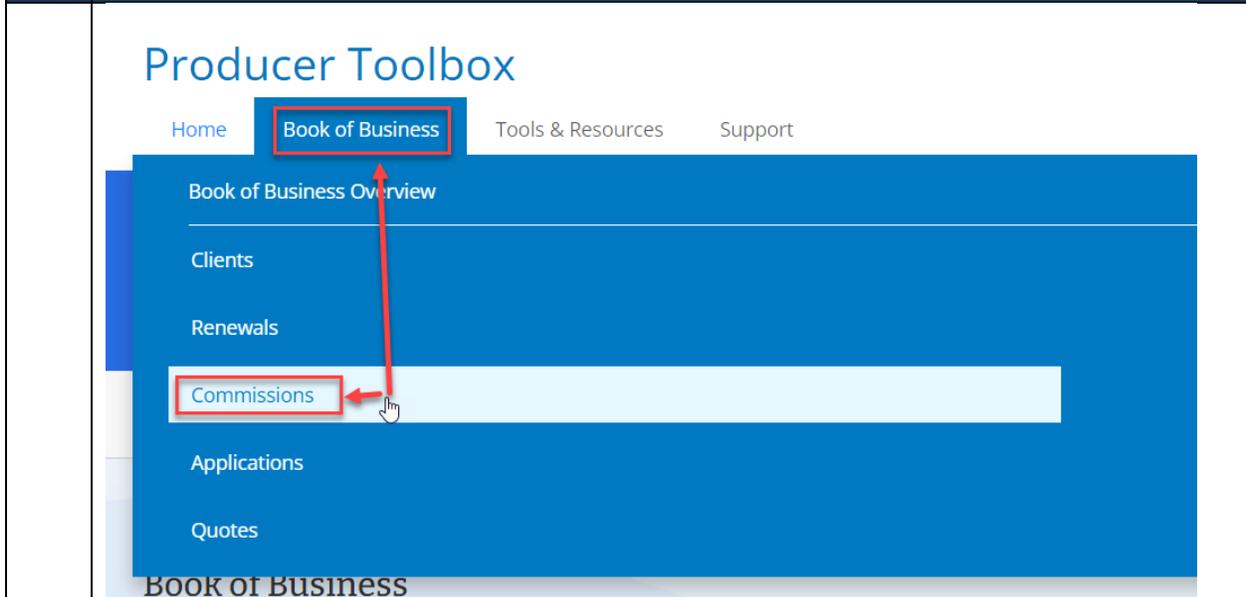
This section of the document will provide the broker guidance on logging into the Producer Toolbox

Step	Action
1	<p>Enter the Producer Toolbox website: https://brokerportal.anthem.com/apps/ptb/login into your internet browser.</p> <p>Note: Google Chrome is the recommended browser</p>
2	<p>Enter your Username and Password into the Log In page and click <Log In> button.</p>  <p>Note:</p> <ul style="list-style-type: none"> For new users, register to the site by clicking the <Register Now> link below the Broker Login. Enter all required information to gain immediate access to the secure site. Use the current email address registered on file when registering.

Accessing PDF and CSV Broker Commission Statements

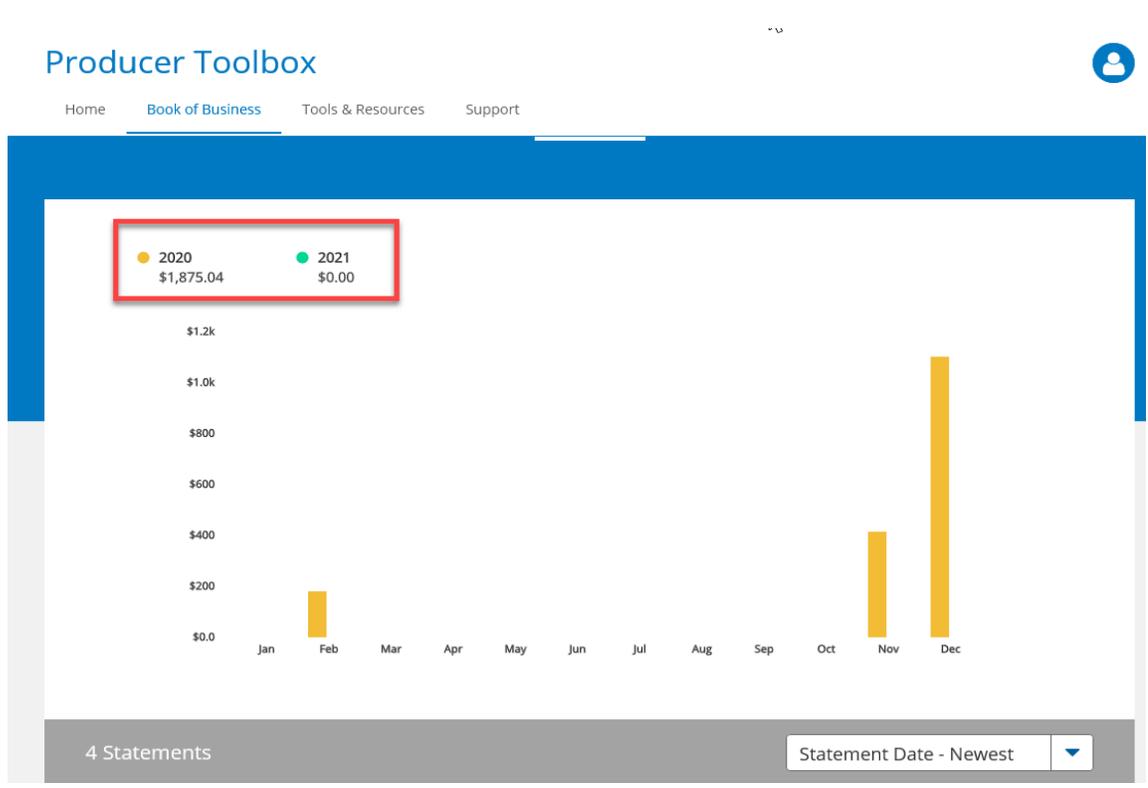
This section will provide guidance on how to access the broker commission statements in the PDF and CSV formats.

Step	Action
1	<p>Once the user is logged in, the Home page will be displayed</p> 
2	<p>Next, click on the <Book of Business> tab</p> 
3	<p>Using the Book of Business dropdown, Choose <Commissions>.</p>



4 The summary by month will be displayed. Each month will include all compensation received during the given month for ALL lines of business.

Each year will be indicated by the color code.



Note: Weekly Medicare statement totals will be combined by month with the Group and Individual business.

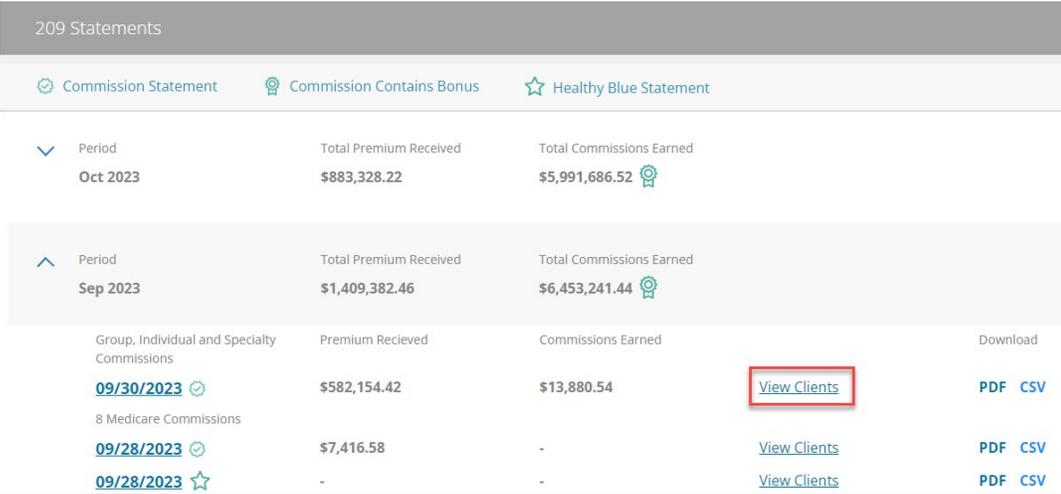
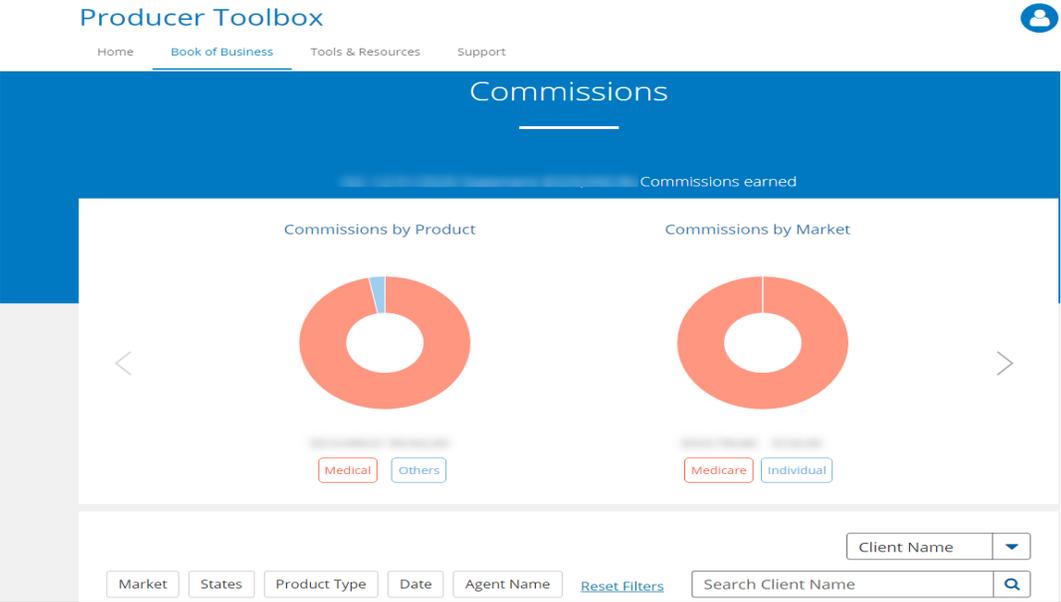
5 A statement key can be utilized to identify the type of statement:

Step	Action																								
	<div data-bbox="292 231 1412 504"> <p>209 Statements</p> <p>1 Commission Statement 2 Commission Contains Bonus 3 Healthy Blue Statement</p> <table border="1"> <thead> <tr> <th>Period</th> <th>Total Premium Received</th> <th>Total Commissions Earned</th> </tr> </thead> <tbody> <tr> <td>Oct 2023</td> <td>\$883,328.22</td> <td>\$5,991,686.52</td> </tr> <tr> <td colspan="3">6 Medicare Commissions</td> </tr> <tr> <td>10/19/2023</td> <td>\$30,224.23</td> <td>-</td> </tr> <tr> <td>10/19/2023</td> <td>-</td> <td>-</td> </tr> </tbody> </table> </div> <table border="1" data-bbox="292 514 966 661"> <thead> <tr> <th>Field #</th> <th>Field Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Commission Statement</td> </tr> <tr> <td>2</td> <td>Commission Contains Bonus Payments</td> </tr> <tr> <td>3</td> <td>Healthy Blue Statement</td> </tr> </tbody> </table>	Period	Total Premium Received	Total Commissions Earned	Oct 2023	\$883,328.22	\$5,991,686.52	6 Medicare Commissions			10/19/2023	\$30,224.23	-	10/19/2023	-	-	Field #	Field Description	1	Commission Statement	2	Commission Contains Bonus Payments	3	Healthy Blue Statement	
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6	<p>The statements are organized by Month. Each month can be maximized by line of business and statement ending date.</p> <ul style="list-style-type: none"> Medicare business will be displayed by week based on the weekly compensation calendar. Group and Individual business will be displayed by month based on the monthly compensation calendar. <div data-bbox="292 871 1364 1381"> <p>209 Statements</p> <p>Commission Statement Commission Contains Bonus Healthy Blue Statement</p> <table border="1"> <thead> <tr> <th>Period</th> <th>Total Premium Received</th> <th>Total Commissions Earned</th> </tr> </thead> <tbody> <tr> <td>Oct 2023</td> <td>\$883,328.22</td> <td>\$5,991,686.52</td> </tr> <tr> <td colspan="3"> <div data-bbox="357 1123 470 1197" style="border: 1px solid red; padding: 2px;"> Period Sep 2023 </div> </td> </tr> <tr> <td colspan="3"> <div data-bbox="316 1207 365 1239" style="color: red;">→</div> Group, Individual and Specialty Commissions </td> </tr> <tr> <td>09/30/2023</td> <td>\$582,154.42</td> <td>\$13,880.54</td> </tr> <tr> <td colspan="3"> <div data-bbox="316 1291 365 1323" style="color: red;">→</div> 8 Medicare Commissions </td> </tr> <tr> <td>09/28/2023</td> <td>\$7,416.58</td> <td>-</td> </tr> <tr> <td>09/28/2023</td> <td>-</td> <td>-</td> </tr> </tbody> </table> </div>	Period	Total Premium Received	Total Commissions Earned	Oct 2023	\$883,328.22	\$5,991,686.52	<div data-bbox="357 1123 470 1197" style="border: 1px solid red; padding: 2px;"> Period Sep 2023 </div>			<div data-bbox="316 1207 365 1239" style="color: red;">→</div> Group, Individual and Specialty Commissions			09/30/2023	\$582,154.42	\$13,880.54	<div data-bbox="316 1291 365 1323" style="color: red;">→</div> 8 Medicare Commissions			09/28/2023	\$7,416.58	-	09/28/2023	-	-
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7	<p>Click on the PDF Hyperlink on the Commission Summary screen to display the PDF version of the commission statement.</p> <div data-bbox="292 1449 1364 1648"> <table border="1"> <thead> <tr> <th>Group, Individual and Specialty Commissions</th> <th>Premium Recieved</th> <th>Commissions Earned</th> <th>Download</th> </tr> </thead> <tbody> <tr> <td>09/30/2023</td> <td>\$582,154.42</td> <td>\$13,880.54</td> <td>View Clients PDF CSV</td> </tr> <tr> <td colspan="4">8 Medicare Commissions</td> </tr> <tr> <td>09/28/2023</td> <td>\$7,416.58</td> <td>-</td> <td>View Clients PDF CSV</td> </tr> <tr> <td>09/28/2023</td> <td>-</td> <td>-</td> <td>View Clients PDF CSV</td> </tr> </tbody> </table> </div> <p>Note: Medicare business and Group & Individual business will have different statement formats.</p>	Group, Individual and Specialty Commissions	Premium Recieved	Commissions Earned	Download	09/30/2023	\$582,154.42	\$13,880.54	View Clients PDF CSV	8 Medicare Commissions				09/28/2023	\$7,416.58	-	View Clients PDF CSV	09/28/2023	-	-	View Clients PDF CSV				
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	8 Medicare Commissions				
	09/28/2023 	\$7,416.58	-	View Clients	PDF CSV
	09/28/2023 	-	-	View Clients	PDF CSV
9	The Commission Summary screen will also provide additional information noted in the next section of this document.				

Commissions Earned and Commission Summary

This section will review the commissions earned by client and the commission summary by month and year to date.

Step	Action																									
1	<p>Click on the View Clients on the Commission Summary Screen to display the Commissions Earned screen.</p>  <p>209 Statements</p> <p>Commission Statement Commission Contains Bonus Healthy Blue Statement</p> <table border="1"> <thead> <tr> <th>Period</th> <th>Total Premium Received</th> <th>Total Commissions Earned</th> </tr> </thead> <tbody> <tr> <td>Oct 2023</td> <td>\$883,328.22</td> <td>\$5,991,686.52</td> </tr> <tr> <td>Sep 2023</td> <td>\$1,409,382.46</td> <td>\$6,453,241.44</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Group, Individual and Specialty Commissions</th> <th>Premium Received</th> <th>Commissions Earned</th> <th>Download</th> </tr> </thead> <tbody> <tr> <td>09/30/2023</td> <td>\$582,154.42</td> <td>\$13,880.54</td> <td>View Clients PDF CSV</td> </tr> <tr> <td>8 Medicare Commissions</td> <td>09/28/2023</td> <td>\$7,416.58</td> <td>View Clients PDF CSV</td> </tr> <tr> <td>09/28/2023</td> <td>-</td> <td>-</td> <td>View Clients PDF CSV</td> </tr> </tbody> </table>	Period	Total Premium Received	Total Commissions Earned	Oct 2023	\$883,328.22	\$5,991,686.52	Sep 2023	\$1,409,382.46	\$6,453,241.44	Group, Individual and Specialty Commissions	Premium Received	Commissions Earned	Download	09/30/2023	\$582,154.42	\$13,880.54	View Clients PDF CSV	8 Medicare Commissions	09/28/2023	\$7,416.58	View Clients PDF CSV	09/28/2023	-	-	View Clients PDF CSV
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2	<p>This Commissions Earned screen will display the total commission paid by Product and Market. This will provide access to searching by Client Name, Market, State, Product Type, Date, and Agent Name.</p>  <p>Producer Toolbox</p> <p>Home Book of Business Tools & Resources Support</p> <h3>Commissions</h3> <p>Commissions earned</p> <div> <p>Commissions by Product</p> <p>Commissions by Market</p> <p>Medical Others Medicare Individual</p> <p>Market States Product Type Date Agent Name Reset Filters Search Client Name</p> </div>																									
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4 The Summary section of the cover page will include a summarization of **Current Statement Totals and Year to Date Totals**

Summary	Current Statement Totals	Year-to-Date Totals
1 Prior Balance		
2 Prior Held Amount		
3 Base Payment Total		
4 Override Payment Total		
5 Admin Fees Payment Total		
6 Other Payments		
7 Levy/Garnishment		
8 IRS Withheld		
9 State Withheld		
10 Paid Amount	\$0.86	
11 New Balance		
12 New Held Amount		
View Clients		PDF CSV

#	Field Name	Field Description
1	Prior Balance	Agent/Agency Negative Balance from Prior payment period
2	Prior Held Amount	Agent/Agency Held Balance from Prior payment period
3	Base Payment Total	Total Compensation Payment for the Base Agents/Agencies
4	Override Payment Total	Total Compensation Payment for the Override Agents/Agencies
5	Admin Fees Payment Total	Total Compensation for Admin Fees
6	Other Payments	Total Compensation for all other types of payments
7	Levy/Garnishment	Amount of compensation that will be withheld as a result of a Levy and/or Garnishment
8	IRS Withheld	Amount of compensation withheld by the IRS
9	State Withheld	Amount of compensation withheld by the State

Step	Action		
10	Paid Amount	Total Compensation Paid	
11	Current Balance		Agent/Agency Negative Balance in the Current payment period, any new negative or existing negative balance continuing
12	Current Held Amount		Agent/Agency Held Balance in the Current payment period, any new held balance or existing held balance continuing
13	View Clients		A hyperlink to display the total commission paid by Product and Market. This will provide access to searching by Client Name, Market, State, Product Type, Date, and Agent/Agency Name
14	PDF		A hyperlink to download the PDF version of the statement
15	CSV		A hyperlink to download the Microsoft Excel version of the statement
16	Current Statement Totals		Commission fields summarized for the current statement (weekly/monthly)
17	Year-To-Date Totals		Commission fields summarized by year-to-date