

# 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

itep	p Act	on				
1	Enter the Producer Toolbox website: <u>https://br</u>	okerportal.anthem.com/apps/ptb/login into				
	your internet browser.	bur internet browser.				
	<b>Note</b> : Google Chrome is the recommended bro	wser				
2	Enter your Username and Password into the Lo	Enter your <b>Username</b> and <b>Password</b> into the Log In page and click < <b>Log In</b> > button.				
		v - □ × ⊮★★□ ≅ :				
	📀 My Home 🤹 Producer Toolbox 😵 Anthem ASCS Login 🧧 SCLC Project Links 🧧 SCLC - Production L. 🗧 SOP and Training R.	Team Sites 🧧 Misc Links 🧧 Imported From E				
	Producer Too	lbox				
	The Producer Assistant is available on the Broker Plus app! Chat with	the assistant, or start a Live Chat with a representative.				
	Brokers Log In Here					
	Already registered with our Producer Appointment Tool?	g go passwordless?				
	You can use the same login details here.					
	Username	tog carbox protections and an				
		Vou'll receive a login request on your				
	Password Go Passwordless Enter your password  Well send your mobile device a	Produce Toolbox.				
	Or request now.	complete your login.				
	Log In Send Request	Don't have Broker Plus mobile app? Get a link to download the app for IOS or Android				
	Forgot Username? OF Forgot Password?	(XXXX) XXXX Tox me				
		App Store Google Play				
	Aiready a broker but don't have Producer looibox access? Register Now					
	Contact Us   Terms & C	anditions				
	Note:					
	• For new users, register to the site by clicking	the < <b>Register Now</b> > 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 whe	n 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	Once the user is logged in, the <b>Home</b> page will be displayed				
	🟠 🔹 brokerpostullanthem.com/upps/ph/du/blow/e/EM/GM/FL/FV 🕏 Producer Toubox 😵 Amtem AKSLiopin 📓 SGC Projections 🔚 SGC - Production L. 📓 SGC - Production L. 📓 SGC - Production L. 📓 SGC - Production L.				
	Producer Toolbox 🗘 😫				
	Home Book of Business Tools & Resources Support				
	Good Morning, We've redesigned your dashboard! Take the tour now.				
	Set As Default C Switch To Medicare Dashboard				
	Book of Business				
	View Clients > Manage Renewals > View Applications > Start Quote >				
	Latest News View All News > Quick Links				
	Updates to Your     Empire is becoming     New lower-cost     Broker Launchpad       Commission Statements     Anthem     Individual network     Statements				
	Small Group Quote Find Care				
2	Next, click on the <book business="" of=""> tab</book>				
	Bookerportulanthen.com/ops/ptb/datboord/EMACMPIC/PV      Podaer Toolbox & Anthen ACS Login S. SCC-Production L. SSP and Training E. Team Size Mulcinia Imported From E				
	Producer Toolbox				
	Home Book of Business Tools & Resources Support				
	Good Morning, Take the tour now.				
	🐵 Set As Default 💦 📿 Switch To Medicare Dashboard				
	Book of Business				
	View Clients > View Clients > View Applications > View Appli				
3	Using the Book of Business dropdown, Choose < <b>Commissions</b> >.				

Step	Action
	Producer Toolbox
	Home Rook of Rusiness Tools & Pesources Support
	Pools & Resources Support
	Clients
	Renewals
	Commissions
	Applications
	Quotes
	Book of Business
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.
	Producer Toolbox
	Home Book of Business Tools & Resources Support
	<ul> <li>2020</li> <li>\$1,875.04</li> <li>\$0.00</li> </ul>
	\$1.2k
	\$1.0k
	\$800
	\$600
	\$400
	\$0.0
	Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
	4 Statements
	<b>Note</b> : 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				
	209 Statements				
	Commission Statement     O Commission Statement	2 3	e Statement		
			e statement		
	→ Period	Total Premium Received	Total Commissions Earned		
	000 2025	\$003,320.22	ېل ۲,000.52 <del>ک</del> ړ		
	6 Medicare Commissions	\$30,224.23	. @	View Clients	PDF CSV
	<u>10/19/2023</u> 公		-	View Clients	PDF CSV
	Field # Field Des	cription			
	1 Commiss	ion Statement			
	2 Commiss	ion Contains Bonus Pa	ayments		
	3 Healthy B	Blue Statement			
6	The statements are o	rganized by Month.	Each month can be	maximized by lin	ne of business
-	and statement ending	g date.			
	Modicaro businos	s will be displayed by	wook based on the	o wookly compo	acation calendar
	Iviedicare busines	ss will be displayed by	week based on the	e weekiy compe	isation calendar.
	Group and Individ	dual business will be c	displayed by month	based on the m	onthly
	compensation ca	lendar.			
	209 Statements				
	Ocmmission Statement	🖗 Commission Contains Bonus	🛱 Healthy Blue Statement		
	2.2		8 8 8 8		
	Period     Oct 2022	Total Premium Received	Total Commissions Earned		
	000 2025	\$003,320.22	\$3,551,000.52 M		
	Period	Total Premium Received	Total Commissions Earned		
	Sep 2023	\$1,409,382.46	\$6,453,241.44		
	Group, Individual and Spe	cialty Premium Recieved	Commissions Earned		Download
	Commissions				
	<u>09/30/2023</u> 🔗	\$582,154.42	\$13,880.54	View Clients	PDF CSV
	8 Medicare Commissions	\$7 /16 58		View Clients	PDF CSV
	09/20/2023	\$7,410.50	-	View Clients	PDF CSV
7	Click on the DDE Uver	orlink on the Commin		on to display the	
/	Click on the PDF Hype	erlink on the <b>Commis</b>	sion Summary scre	en to display the	e PDF version of
		ement.	Commission Commission		Developed
	Commissions	Premium Recieved	Commissions Earned		Download
	<u>09/30/2023</u> ⊘	\$582,154.42	\$13,880.54	View Clients	PDF CSV
	8 Medicare Commissions				
	<u>09/28/2023</u> ⊘	\$7,416.58	-	View Clients	PDF CSV
	<u>09/28/2023</u> 🏠	-	-	View Clients	PDF CSV
	Note: Medicare busi	ness and Group & Ind	ividual business wi	ll have different	statement
	formats.				
8	Click on the <b>CSV</b> Hype	erlink on the <b>Commis</b>	sion Summary scre	en to display the	commission
	statement in Microso	off Excel	Sign Summary Scie		
1	statement in Microso				

Step			Action		
	Group, Individual and Specialty Commissions	Premium Recieved	Commissions Earned		Download
	<u>09/30/2023</u> ⊘	\$582,154.42	\$13,880.54	View Clients	PDF CSV
	8 Medicare Commissions				
	<u>09/28/2023</u> ⊘	\$7,416.58	-	View Clients	PDF CSV
	<u>09/28/2023</u> 🏠	-	-	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.

Click on the View Clien	<b>ts</b> on the Commissi	Action on Summary Screer	n to display the	Commissior
209 Statements				
<ul> <li>Commission Statement</li> </ul>	Commission Contains Bonus	🟠 Healthy Blue Statement		_
<ul> <li>Period</li> <li>Oct 2023</li> </ul>	Total Premium Received \$883,328.22	Total Commissions Earned		
Period Sep 2023	Total Premium Received \$1,409,382.46	Total Commissions Earned \$6,453,241.44		
Group, Individual and Specialty Commissions	/ Premium Recieved	Commissions Earned		Download
09/30/2023 ② 8 Medicare Commissions	\$582,154.42	\$13,880.54	<u>View Clients</u>	PDF CSV
<u>09/28/2023</u> ⊘	\$7,416.58	-	View Clients	PDF CSV
This will provide access Agent Name.	to searching by Cli	ent Name, Market,	Sion paid by Pro State, Product	Type, Date, a
This will provide access Agent Name. Producer Tool	box	ent Name, Market,	State, Product	Type, Date, a
This will provide access Agent Name. Producer Tool Home Book of Business	box	ay the total commis ent Name, Market, <sup>1</sup> ommissions	sion paid by Pro State, Product	Type, Date, a
This will provide access Agent Name. Producer Tool Home Book of Business	to searching by Cli box Tools & Resources Suppor	the total commis ent Name, Market, t commissions Commission	ssion paid by Pro State, Product ns earned	Type, Date, a
This will provide access Agent Name. Producer Tool Home Book of Business	to searching by Cli box Tools & Resources Suppor	T Commissions Commission Commission	ns earned	Souct and W Type, Date, :
This will provide access Agent Name. Producer Tool Home Book of Business	to searching by Cli box Tools & Resources Suppor Commissions by Product	t ent Name, Market, c commissions Commission Commission	Ins earned ssions by Market	Souct and M Type, Date, a
This will provide access Agent Name. Producer Tool Home Book of Business	Commissions by Product Medical Others Product Type Date Agen	tt Name Reset Filters Sea	Ins earned ssions by Market ssions by Market (Lient arch Client Name	Name

Step				Action		
	209	9 Statements				
	0	Commission Statement 🛛 👰 🕻	Commission Contains	Bonus 🏠 Healthy Blue Statement		
	~	Period Oct 2023	Total Premium Recei	ived Total Commissions Earned \$5,991,686.52		
	^	Period Sep 2023	Total Premium Rece <b>\$1,409,382.46</b>	ived Total Commissions Earned \$6,453,241.44 @		
		Group, Individual and Specialty Commissions	Premium Recieved	Commissions Earned \$13,880.54	Down <u>View Clients</u> <b>PDF</b>	load CSV
		8 Medicare Commissions	\$7,416.58		View Clients PDF	CSV
		<u>09/28/2023</u> 公	-		View Clients PDF	CSV
		Summary     Current       Prior Balance     Prior Held Amount       Base Payment Total     Override Payment Total       Override Payment Total     Image: Comparison of the set of	\$0.86	Year-to-Date Totals		
	#	Field Name		Field Description		
	1	Prior Balance		Agent/Agency Negative	Balance from Prior payr	nent
				period		<u> </u>
	2	Prior Held Amou	int	Agent/Agency Held Bal	ance trom Prior payment	period
	3	Base Payment To	otal	Total Compensation Pa Agents/Agencies	yment for the Base	
	4	Override Payme	nt Total	Total Compensation Pa Agents/Agencies	yment for the Override	
	5	Admin Fees Pay	ment Total	Total Compensation for	r Admin Fees	
	6	Other Payments		Total Compensation for	r all other types of payme	ents
	7	Levy/Garnishme	nt	Amount of compensation result of a Levy and/or	on that will be withheld a Garnishment	as a
	8	IRS Withheld		Amount of compensati	on withheld hy the IRS	
	<u>م</u>	State Withhold		Amount of compensati	on withheld by the State	
	3	State withheld		Amount of compensation	on withineld 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