

- ▶ Login to <https://brokerportal.anthem.com/apps/ptb/login> (Producer Toolbox)
- ▶ Enter your Username and Password and click Login

## Brokers Log In Here

Already registered with our Producer Appointment Tool?  
You can use the same login details here.

Username

Password



Go Passwordless



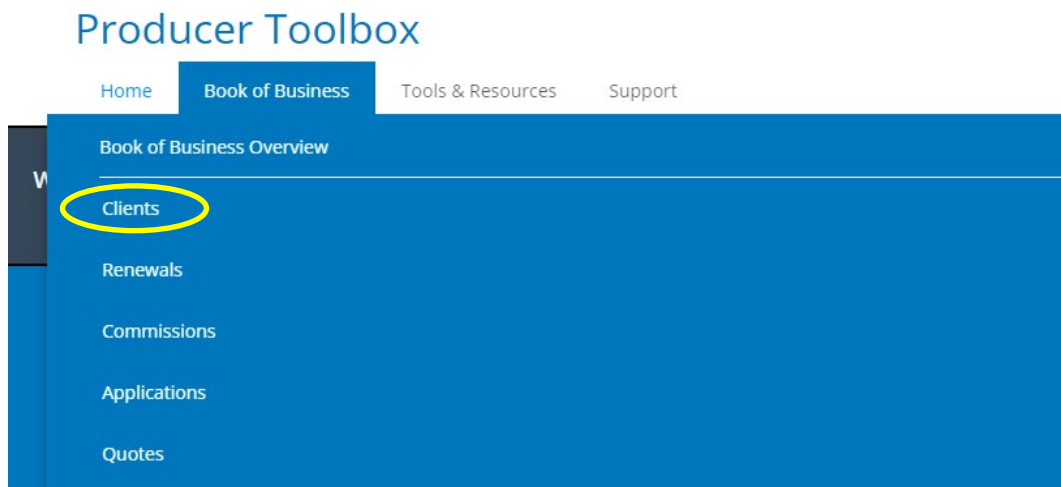
We'll send your mobile device a login request now.

Or

Log In

Send Request

- ▶ On the top toolbar, select "**Book of Business**" then click on "**Clients**" to view your book of business



Producer Toolbox

Home Book of Business Tools & Resources Support

Book of Business Overview

- Clients
- Renewals
- Commissions
- Applications
- Quotes

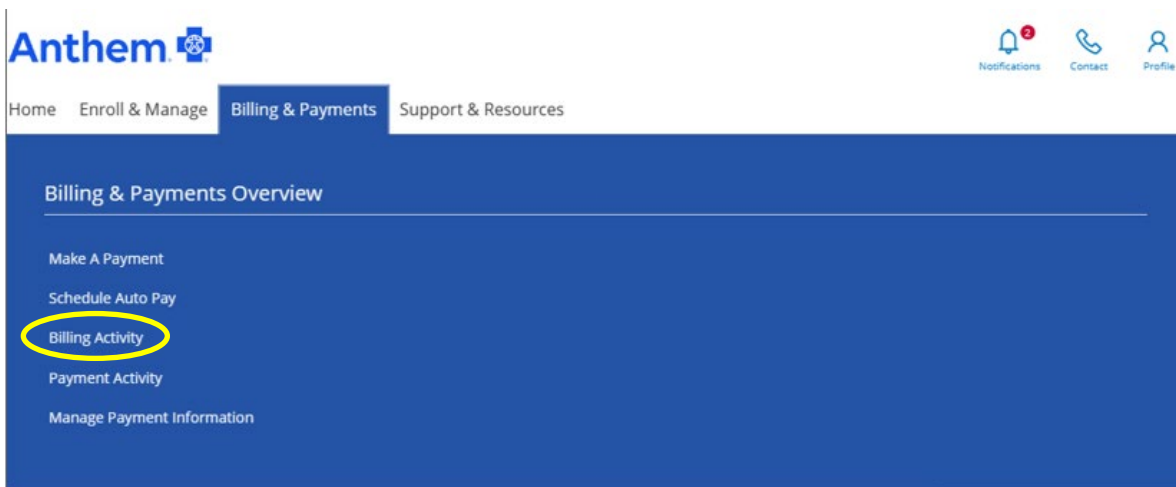
- ▶ You will see a list of your clients. Find the client you wish to run an audit on and select “Go to Employer Access”

[Michael Scott Paper Co.](#)

Client ID	H73567	Product(s)	Renewal Month	New Business	Bill Due Date
Market	Small Group	Medical, Dental, Vision	January	No	02/01/2024
Status	Active	Original Effective Date	ACA	Writing Agent	Paid Agent
State	California	12/15/2021	Yes	Dunder Mifflin Insurance	Dunder Mifflin Insurance
Effective Date	12/15/2021	Parent Agent	Group Size		
Bill Status	Open	Dunder Mifflin Insurance	30		

[Go To Employer Access](#)

- ▶ On the top toolbar, go to “Billing & Payments”, then select “Billing Activity”



Home Enroll & Manage **Billing & Payments** Support & Resources

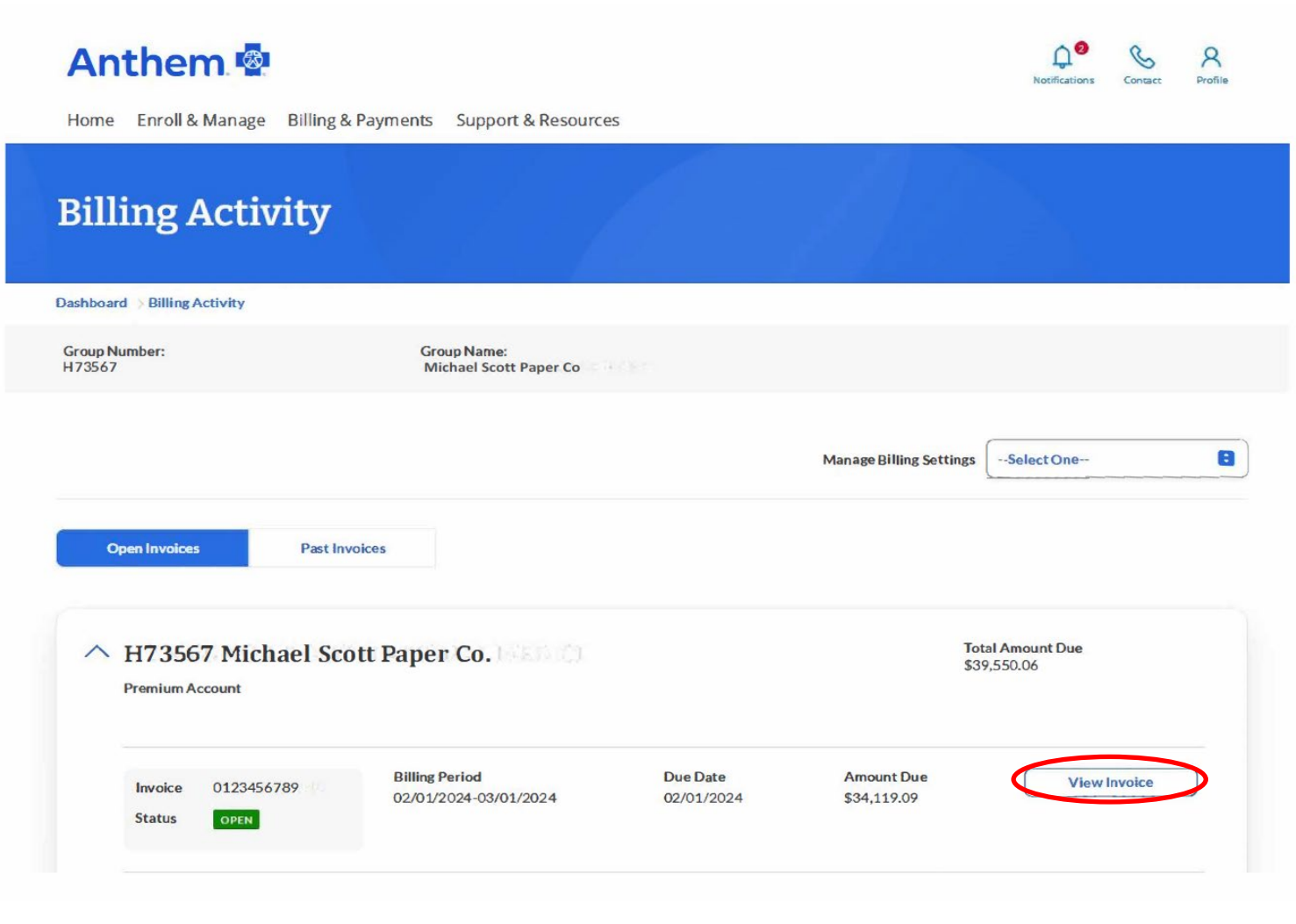
Notifications Contact Profile

Billing & Payments Overview

- Make A Payment
- Schedule Auto Pay
- Billing Activity**
- Payment Activity
- Manage Payment Information

**Note:** If the Billing & Payment tab is missing, Anthem or your client will need to grant you access. Reach out to the CW team for further guidance.

▶ Click on “View Invoice”



Group Number: H73567      Group Name: Michael Scott Paper Co

Manage Billing Settings --Select One--

Open Invoices      Past Invoices



H73567 Michael Scott Paper Co. Premium Account      Total Amount Due \$39,550.06

Invoice	Status	Billing Period	Due Date	Amount Due	View Invoice
0123456789	OPEN	02/01/2024-03/01/2024	02/01/2024	\$34,119.09	<a href="#">View Invoice</a>

▶ Click on “Download” with File Type Excel

## Download Full Invoice

If the invoice has changed since you last downloaded it on 01/08/2024, select **Request Updated Invoice**. This will generate both an Excel and a PDF version of the invoice for download below.

 Your updated invoice is available for download below. 

INVOICE	FILE TYPE	ACTIONS
Invoice_Details_0202401911516.pdf	PDF	<a href="#">Download</a>
Invoice_Details_0202401911516.xlsx	Excel	<a href="#">Download</a>

▶ Open the file that states, “Invoice Details (Excel)”. Once the file is downloaded. Upload the Excel file to Coverage Wizard!