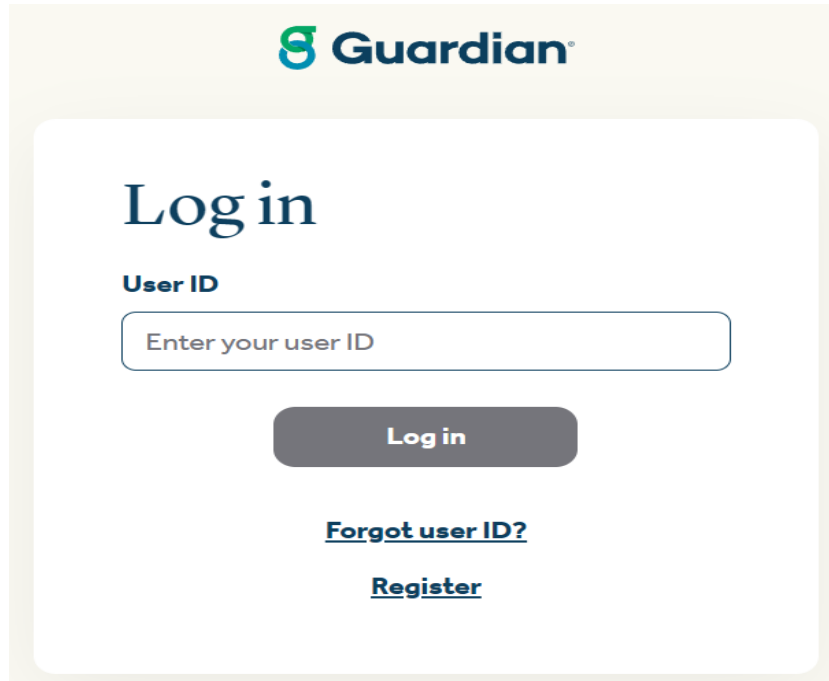


- ▶ Login to <https://brokerportal.anthem.com/apps/ptb/login> (Producer Toolbox)
- ▶ Enter your Username, then Password and click Login



The image shows the Guardian login interface. At the top, the Guardian logo is displayed. Below it, the word "Log in" is prominently featured. Underneath, there is a "User ID" label followed by a text input field containing the placeholder text "Enter your user ID". A dark grey "Log in" button is positioned below the input field. At the bottom of the form, there are two links: "[Forgot user ID?](#)" and "[Register](#)".

- ▶ Select "**Client Billing**" then Select "**Group Search**"

ent group info Client eligibility Client billing Reports Claims status

[Group search](#)

Current bill

View billing statements

View payment history

Impending cancellations

- ▶ Search for your client, either by adding in the **"Group ID"** or type in a few letters of the client's name under **"Company Name"** and select Search

Client Billing

Company Search

i Searching for a company with a future effective date? Search by group ID.
Please Note: If you don't know your group ID on current implementation, please contact your onboarder. If having issues with an active group, please contact customer service at 1-800-627-4200.

Group ID

Division ID (Optional)

→

OR

Company Name

→

Type at least four characters

Search

- ▶ Select **"Client Billing"** then Select **"Current Bill"**



- ▶ Once the payment Summary page appears, Select **"Download Bill"**

Home Commissions Compensation Forms & materials Client group info Client eligibility Client billing Reports Claims status

Payment Summary

[Summary Information](#)

[Advanced Notice of Change](#)

[Bill Premium Detail](#)

Payment Summary

Print bill

Download bill

Print page

- ▶ Once the Download Billing Statement report appears. Change the File Type to **"Comma Delimited File"**.
- ▶ Then push all columns to the right ">>". The under sort by, use the first drop down to select **"Member Name"** in **"Ascending Order"** and then select **"Member ID"** in **"Ascending Order"**
- ▶ Select **"Continue"** at the bottom to run the report.

Download Billing Statement

Group ID: 00522738

Division ID: 0000

Select the File Type:

 Excel Comma Delimited File

Select the order of the columns you would like to view the download of the billing statement. Move the column headings from the listing on the left to the right.

Default Columns:

Display Columns:

Member Name

Member Id

Premium Type

Basic Term Life Volume

Cancer Family Indicator

Cancer Premium

Dental Family Indicator

Dental Premium

Ltd Premium

Ltd Volume

Managed Dental Care Mdc Family Indi



To display Critical Illness Spouse, Critical Illness Child, Voluntary Term Life Spouse, Voluntary Term Life Child, Voluntary AD&D Spouse, Voluntary AD&D Child in separate columns, please select the Column option.

Critical Illness, Voluntary Term Row Column

Life and Voluntary AD&D

Download Layout:

Select up to three sort options.

Sort By:

Member Name

 Ascending Descending

Member Id

 Ascending Descending

Select a Column

 Ascending Descending

Save these preferences

Cancel

Continue

- ▶ The Download Billing Statement will appear, listing out the employees, plans and cost. Scroll to the bottom of the page and select **"Download"**

Download Billing Statement

Member Name	Member Id	Premium Type	Basic Term Life Volume	Cancer Family Indicator	Cancer Premium	Dental Family Indicator	Dental Premium	Ltd Premium	Ltd Volume	Managed Dental Care Mdc Family Indicator	Managed Dental Care Mdc Premium	Vision Family Indicator	Vision Premium	...
20000														
20000		Emp			\$35.11		\$17.94	7800			Emp		\$7.88	

1 2 3 [Next](#)

Cancel

Download

- ▶ Open the file that states, **"DownloadFile (1).csv"**. Once the file is downloaded. Upload the Excel file to Coverage Wizard!