

Quick Reference Guide

mProducer Electronic SOA (eSOA)

Agent Tutorial - How to Transfer Electronic SOA (eSOA) in mProducer

To Begin: Agent Transfer electronic SOA to Beneficiary: Steps to Transfer from mProducer:

1. Click on the "Scope of Appointment" Tile
2. Click on "Create New Electronic SOA"
 - Scroll down, complete the section "Required – to be completed by Agent" (Agent completes prior to transfer)
 - **DO NOT** enter anything into the beneficiary initial fields or signature section.
 - Minimum Information Required: Agent Name, Agent Phone, Beneficiary Name
 - **Leave beneficiary section empty, the beneficiary completes that section upon transfer**
3. Agent will click on the "Transfer to Bene to eSign" on the bottom of the form
4. Agent will receive a pop up box "Transfer eSOA to Beneficiary"
 - Enter "Customer's email ID", "Customer provided 4 digit PIN" (you or your "client/beneficiary" will make up the random PIN), and message (if needed)
 - Then click "Send eSOA"
5. Agent will receive confirmation pop up that eSOA was transferred
6. Agent will see the eSOA status "eSign Requested" on their Electronic Scope of Appointments list
7. An email will be sent to your "client/beneficiary".

Beneficiary signs the eSOA and transfers back to Agent - steps for beneficiary to sign eSOA:

1. Beneficiary will receive email from Anthem. Beneficiary will click on the link to open sign on box
2. Sign on box will appear, beneficiary enter email address and 4 digit pin
3. Beneficiary will complete the "beneficiary section" (two initials and one signature) of the Scope of Appointment
 - Signature can be with mouse or keypad
4. Beneficiary will click "Submit & Transfer Back to Agent" at the bottom of the form
5. Beneficiary will get a "Thank You!" screen and can close window
6. Once the beneficiary signs, then the Agent will see the eSOA status "eSign Received" on their Electronic Scope of Appointments List
7. This confirms the eSOA was signed and completes the eSOA process