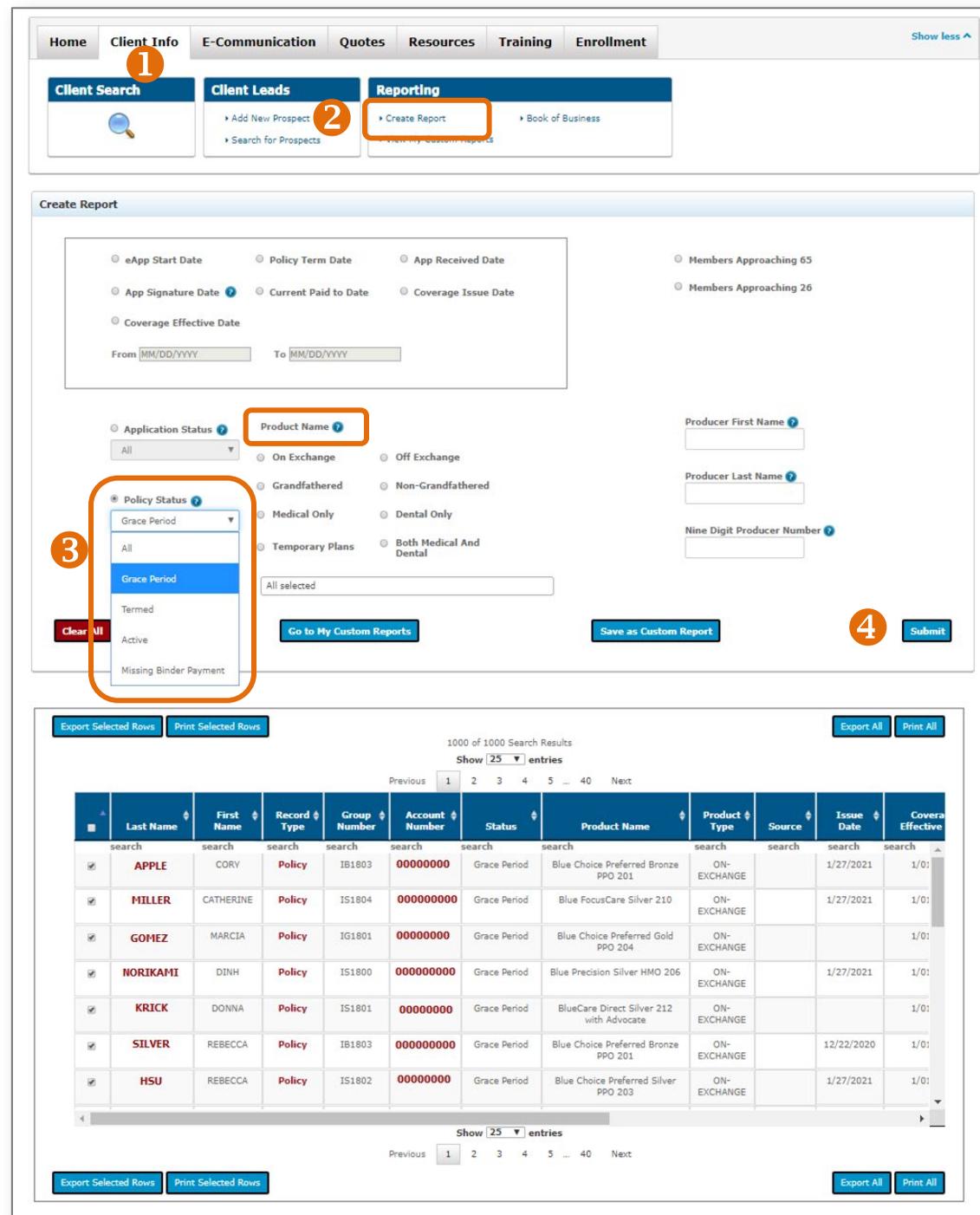


Grace Period Report

Go to the [Retail Producer Portal](#) and log in. You can run a report of clients in either on-exchange or off-exchange grace period. Reports can provide a reference for outreach purposes. To create a report that displays those needing to pay their premium, follow these steps:

1. Go to the "Client Info" tab
2. Click on the "Create Report" link from the Reporting section.
3. Select "Policy Status" and choose "Grace Period" from the dropdown menu. Select other filtering options such as "On Exchange" in the Product Name section.
4. Click "Submit."



The screenshot shows the Retail Producer Portal interface. The top navigation bar includes Home, Client Info (1), E-Communication, Quotes, Resources, Training, and Enrollment. Below this, the Client Info section has three tabs: Client Search, Client Leads, and Reporting (2). The Reporting tab contains a "Create Report" link (3). The "Create Report" form has several sections: "eApp Start Date", "Policy Term Date", "App Received Date", "App Signature Date", "Current Paid to Date", "Coverage Issue Date", and "Coverage Effective Date". There are date input fields for "From" and "To". The "Application Status" dropdown is set to "All". The "Product Name" section (4) has a dropdown menu open, showing "Grace Period" selected. Other options include "On Exchange", "Off Exchange", "Grandfathered", "Non-Grandfathered", "Medical Only", "Dental Only", and "Temporary Plans". There are also input fields for "Producer First Name", "Producer Last Name", and "Nine Digit Producer Number". At the bottom of the form are buttons for "Clear All", "Go to My Custom Reports", "Save as Custom Report", and "Submit".

Below the form is a table of search results. The table has columns for Last Name, First Name, Record Type, Group Number, Account Number, Status, Product Name, Product Type, Source, Issue Date, and Coverage Effective. The table shows 1000 of 1000 search results. The first few rows are:

Last Name	First Name	Record Type	Group Number	Account Number	Status	Product Name	Product Type	Source	Issue Date	Coverage Effective
APPLE	CORY	Policy	IB1803	00000000	Grace Period	Blue Choice Preferred Bronze PPO 201	ON-EXCHANGE		1/27/2021	1/01
MILLER	CATHERINE	Policy	IS1804	00000000	Grace Period	Blue FocusCare Silver 210	ON-EXCHANGE		1/27/2021	1/01
GOMEZ	MARCIA	Policy	IG1801	00000000	Grace Period	Blue Choice Preferred Gold PPO 204	ON-EXCHANGE			1/01
NORIKAMI	DINH	Policy	IS1800	00000000	Grace Period	Blue Precision Silver HMO 206	ON-EXCHANGE		1/27/2021	1/01
KRICK	DONNA	Policy	IS1801	00000000	Grace Period	BlueCare Direct Silver 212 with Advocate	ON-EXCHANGE			1/01
SILVER	REBECCA	Policy	IB1803	00000000	Grace Period	Blue Choice Preferred Bronze PPO 201	ON-EXCHANGE		12/22/2020	1/01
HSU	REBECCA	Policy	IS1802	00000000	Grace Period	Blue Choice Preferred Silver PPO 203	ON-EXCHANGE		1/27/2021	1/01

Missing Binder Report

You can run a report of submitted *on-exchange and off-exchange* qualified health plan applications that still require that important initial payment. To create a report of those needing to pay their first premium, follow these steps:

1. Go to the "Client Info" tab
2. Click on the "Create Report" link from the Reporting section.
3. Select "Application Status" and choose "Pending / In Progress" from the dropdown menu.
4. Click "Submit".
5. Then, export your data. See the following page for details on exporting data from your reports.
6. Repeat steps 1 and 2 above.
7. Select "Policy Status" and choose "Missing Binder Payment" from the dropdown menu.
8. Select optional filtering options from the "Product Name" section.
9. Repeat steps 4 and 5. These two reports will give you a complete picture of those needing support to get their applications completed and their policies effectuated.

The screenshot shows the 'Create Report' interface. The top navigation bar includes tabs for Home, Client Info, E-Communication, Quotes, Resources, Training, and Enrollment. Below this is a secondary navigation bar with three main sections: Client Search, Client Leads, and Reporting. The Reporting section contains a 'Create Report' link, which is highlighted with a red box and a '2' in a red circle. The main 'Create Report' form is divided into several sections. On the left, there are date pickers for 'eApp Start Date', 'App Signature Date', and 'Coverage Effective Date'. In the middle, there are radio buttons for 'Policy Term Date', 'Current Paid to Date', 'App Received Date', and 'Coverage Issue Date'. On the right, there are radio buttons for 'Members Approaching 65' and 'Members Approaching 26'. Below these are two dropdown menus: 'Application Status' and 'Policy Status'. The 'Application Status' dropdown is highlighted with a red box and a '3' in a red circle, and the 'Policy Status' dropdown is also highlighted with a red box and a '7' in a red circle. Both dropdowns have 'Missing Binder Payment' selected. To the right of these dropdowns is a 'Product Name' section with a red box and an '8' in a red circle, containing radio buttons for 'On Exchange', 'Off Exchange', 'Grandfathered', 'Non-Grandfathered', 'Medical Only', 'Dental Only', 'Temporary Plans', and 'Both Medical And Dental'. Below this is a text input field with 'All selected'. At the bottom of the form, there are four buttons: 'Clear All', 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit'. The 'Submit' button is highlighted with a red box and a '4' in a red circle.

Exporting Reports

It's easy to print and/or export some or all of the data from any report.

- 1. Export Selected Rows:** Select the rows that you'd like to export and click on the "Export Selected Rows" button. The data you selected is automatically saved to a Microsoft Excel spreadsheet file with the default filename of "AdvancedSearchResults.xls" and is downloaded to your computer's download folder. Open the file and save it with an appropriate name to the location needed.
- 2. Print Selected Rows:** Select the rows that you'd like to print. Then click on the "Print Selected Rows" button. All of the data that you selected will appear in print preview. Select the "Print" link in the top right corner to send the data to your printer. If you have Adobe Acrobat, you can also save the data to a PDF file.
- 3. Export All:** All of the data in the table is automatically saved to a Microsoft Excel spreadsheet file with the default filename of "AdvancedSearchResults.xls" and downloaded to your computer's download folder. Open the file and save it with an appropriate name to the location needed.
- 4. Print All:** Click "Print All" and all of the data in the table will appear in a print preview window. Select the "Print" link in the top right corner to send the data to your printer. If you have Adobe Acrobat, you can also save the data to a PDF file.

The screenshot shows a search results interface. At the top, there are buttons for "Export Selected Rows" (1) and "Print Selected Rows" (2). The search results are displayed in a table with columns: Last Name, First Name, Record Type, E-App Number, E-App Started, Group Number, Account Number, Status, Product Name, Product Type, App. Received, Issue Date, Coverage Effective Date, and Paid To Date. The table contains four rows of data. A vertical orange box highlights the selection checkboxes in the first column of the table. At the top right, there are buttons for "Export All" (3) and "Print All" (4). The interface also includes pagination controls and a message: "1000 of 3501 Search Results. The search results exceed 1000 records. Please select additional filters to narrow your results or Export All or Print All to view search results." The "Items Per Page" is set to 25.

	Last Name	First Name	Record Type	E-App Number	E-App Started	Group Number	Account Number	Status	Product Name	Product Type	App. Received	Issue Date	Coverage Effective Date	Paid To Date
<input type="checkbox"/>	WASHINGTON	MARY	Application	0100300865	9/26/2017	IB2602		Started	Blue Choice Preferred Bronze PPO 105	OFF-EXCHANGE	9/26/2017			
<input type="checkbox"/>	ADAMS	SARA	Application	0100300865	9/26/2017	DI2603		Started	BlueCare Dental 4 Kids 1A	OFF-EXCHANGE	9/26/2017			
<input type="checkbox"/>	JEFFRESON	TOMAS	Application	0100300256	9/21/2017	IB2605		Started	Blue Precision Bronze HMO 103	OFF-EXCHANGE	9/21/2017			
<input type="checkbox"/>	MADISON	DAVID	Application	0100300259	9/21/2017	IB2605		Started	Blue Precision Bronze HMO 103	OFF-EXCHANGE	9/21/2017			

Save Custom Reports

1. Select the "Create Report" link from the Reporting section of the Client Info tab.
2. Select your reporting parameters. In this example, the report being created is for all active off exchange policies.
3. Click the "Submit" button.
4. Select the "Save as Custom Report" button.
5. A pop-up box opens allowing you to create a name for the report.
6. Click the "Save" button to save the custom report.

The screenshot displays the 'Create Report' interface within a web application. The top navigation bar includes 'Home', 'Client Info', 'E-Communication', 'Quotes', 'Resources', 'Training', and 'Enrollment'. Below this, there are three main sections: 'Client Search', 'Client Leads', and 'Reporting'. The 'Reporting' section contains a 'Create Report' link (callout 1) and a 'View My Custom Reports' link. The 'Create Report' form includes several sections: 'eApp Start Date', 'App Signature Date', 'Coverage Effective Date', 'Policy Term Date', 'Current Paid to Date', 'Initial Payment Not Received', 'Members Approaching 65', and 'Members Approaching 26'. There are date input fields for 'From' and 'To'. The 'Application Status' dropdown is set to 'Select One' (callout 2). The 'Policy Status' dropdown is set to 'Active' (callout 2). The 'Product Name' section has radio buttons for 'On Exchange', 'Grandfathered', 'Medical Only', and 'Temporary Plans'. The 'Off Exchange' radio button is selected (callout 2). The 'All selected' button is highlighted (callout 4). The 'Save as Custom Report' button is highlighted (callout 4). The 'Submit' button is highlighted (callout 3). A 'Save Custom Report' pop-up window is shown in the foreground, with a text input field containing 'All Active Off Exchange' (callout 5) and a 'Save' button (callout 6).

View Custom Reports

After saving custom reports, you can run them again at any time. You can save up to 10 custom reports.

1. Select "View My Custom Reports" from the Reporting section of the Client Info tab.
2. Click on the "Run Report" button to see refreshed data.
3. If you've saved 10 reports and need to save another, one saved report will need to be deleted by clicking on the "Remove" button before a new report can be added.

