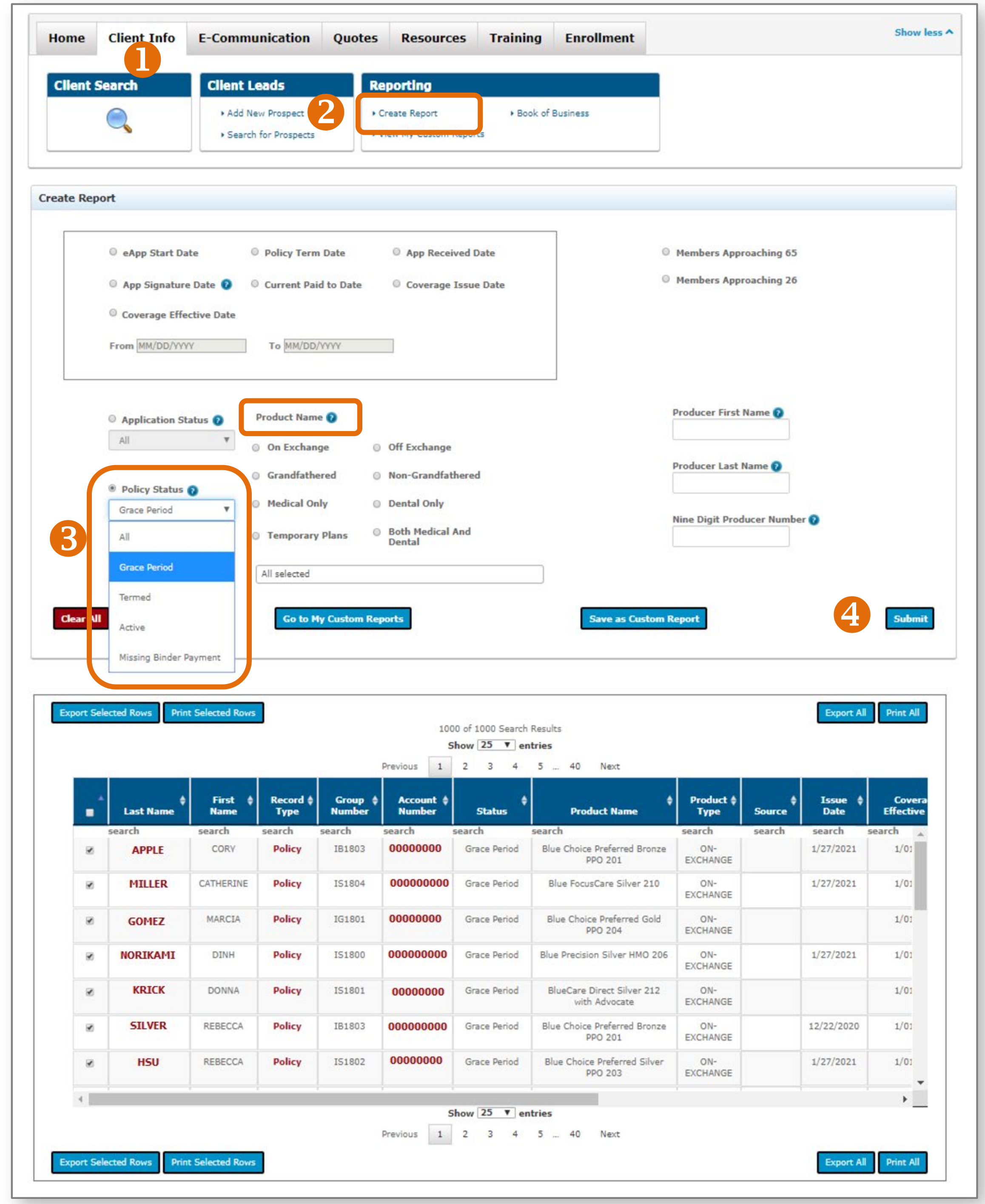
BlueCross BlueShield.
Illinois · Montana · New Mexico
Oklahoma · Texas

# 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:

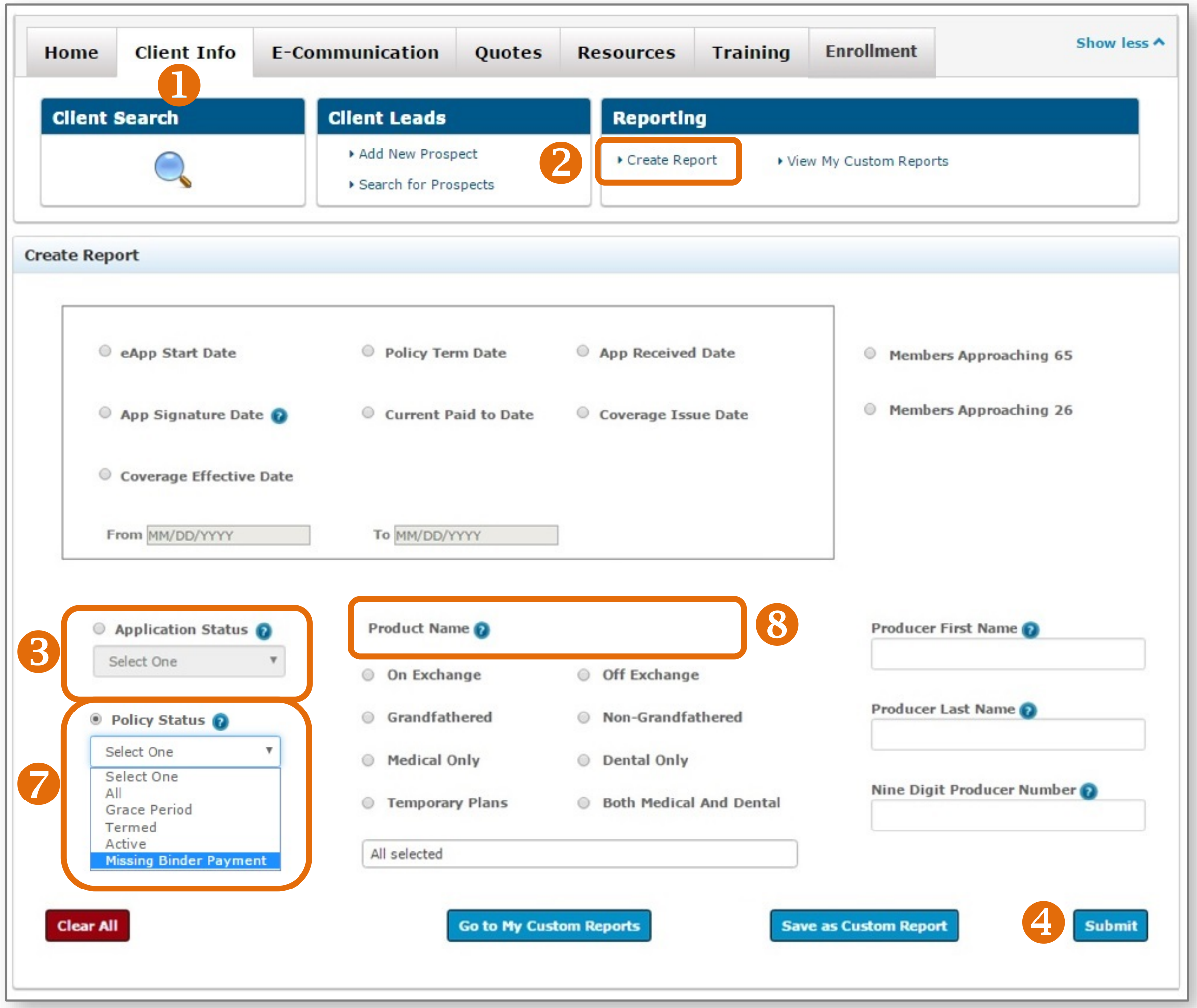
1. Go to the "Client Info" tab
2. Click on the "Create Report" link from the Reporting section.
3. Select "Policy Status" and choose "Grace Period" from the dropdown menu. Select other filtering options such as "On Exchange" in the Product Name section.
4. Click "Submit."



# 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.

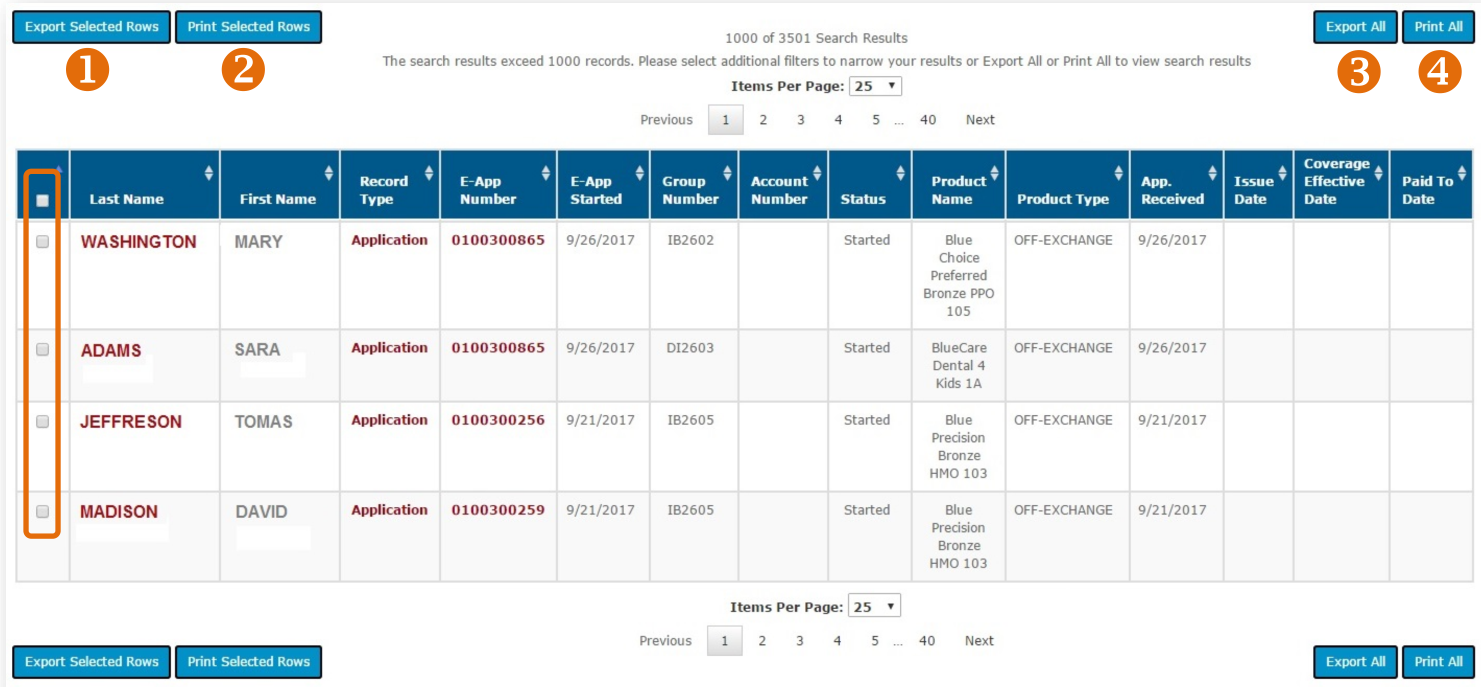


# Exporting Reports

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.

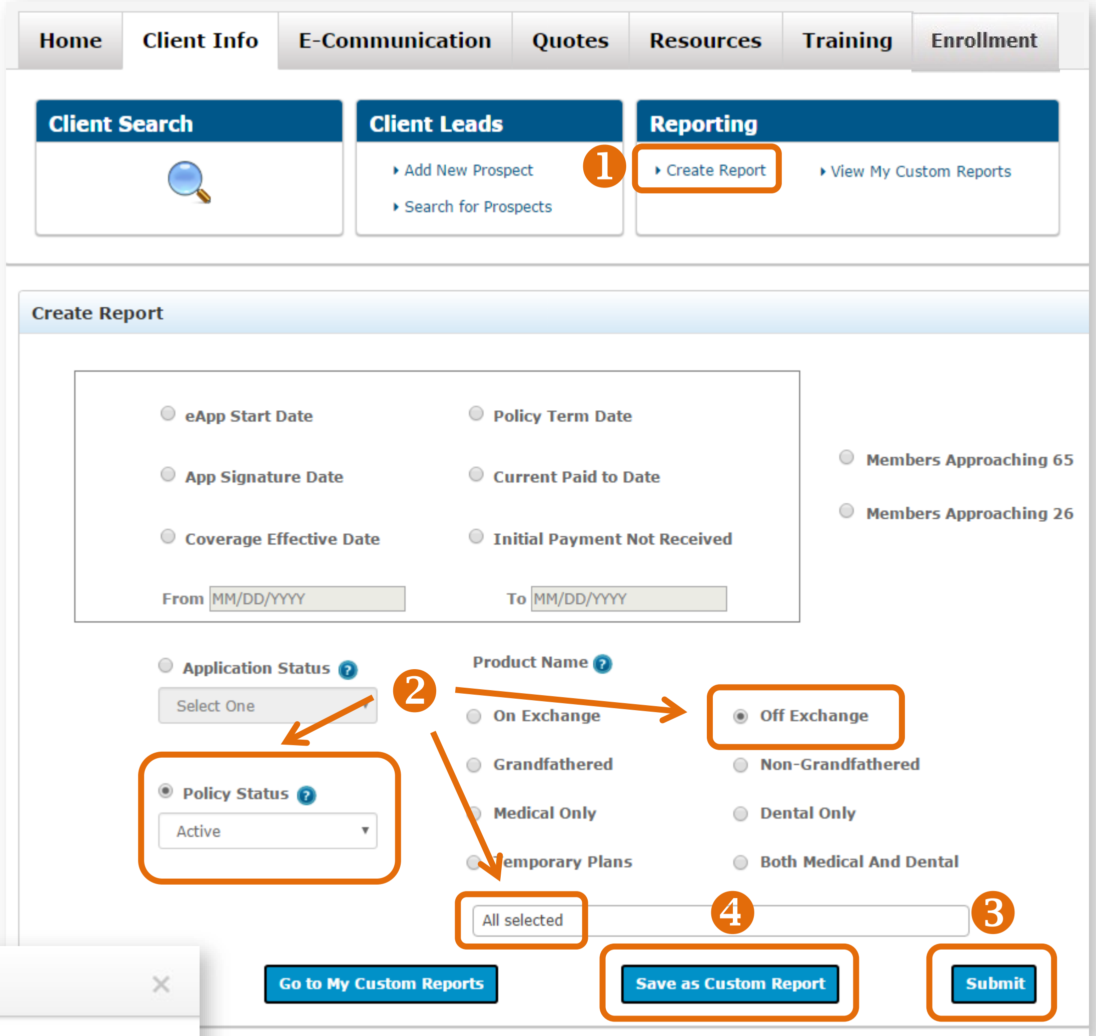


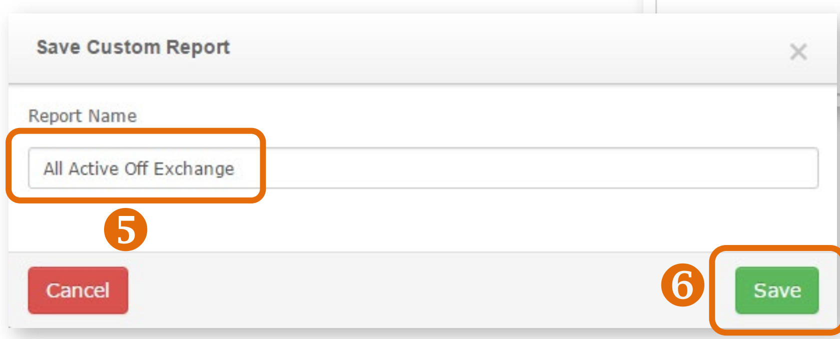

3. **Export All:** All of the data in the table is automatically saved to a Microsoft Excel spreadsheet file with the default filename of "AdvancedSearchResults.xls" and downloaded to your computer's download folder. Open the file and save it with an appropriate name to the location needed.

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.

# 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.



# 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.