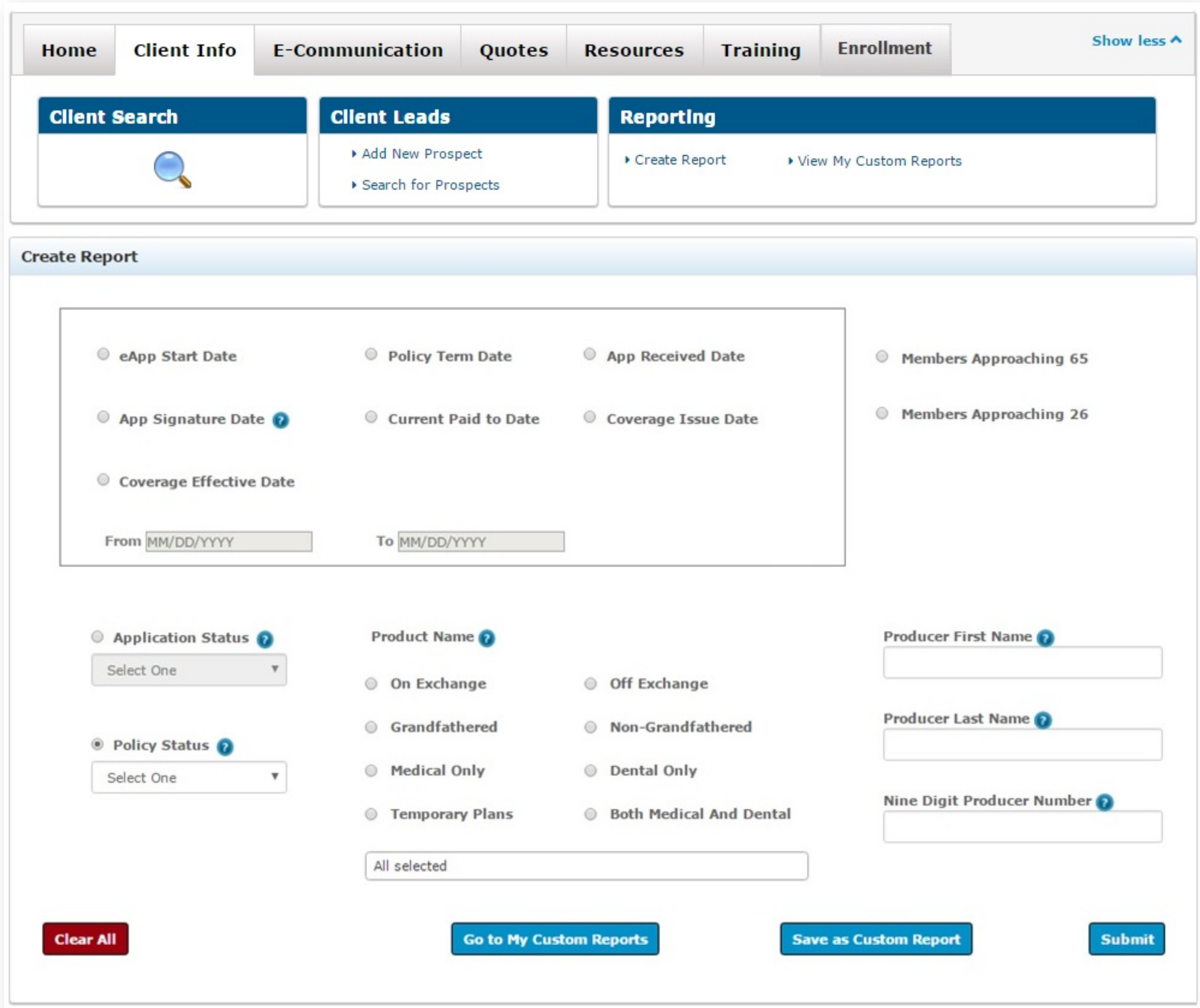
Using Reports in the Retail Producer Portal



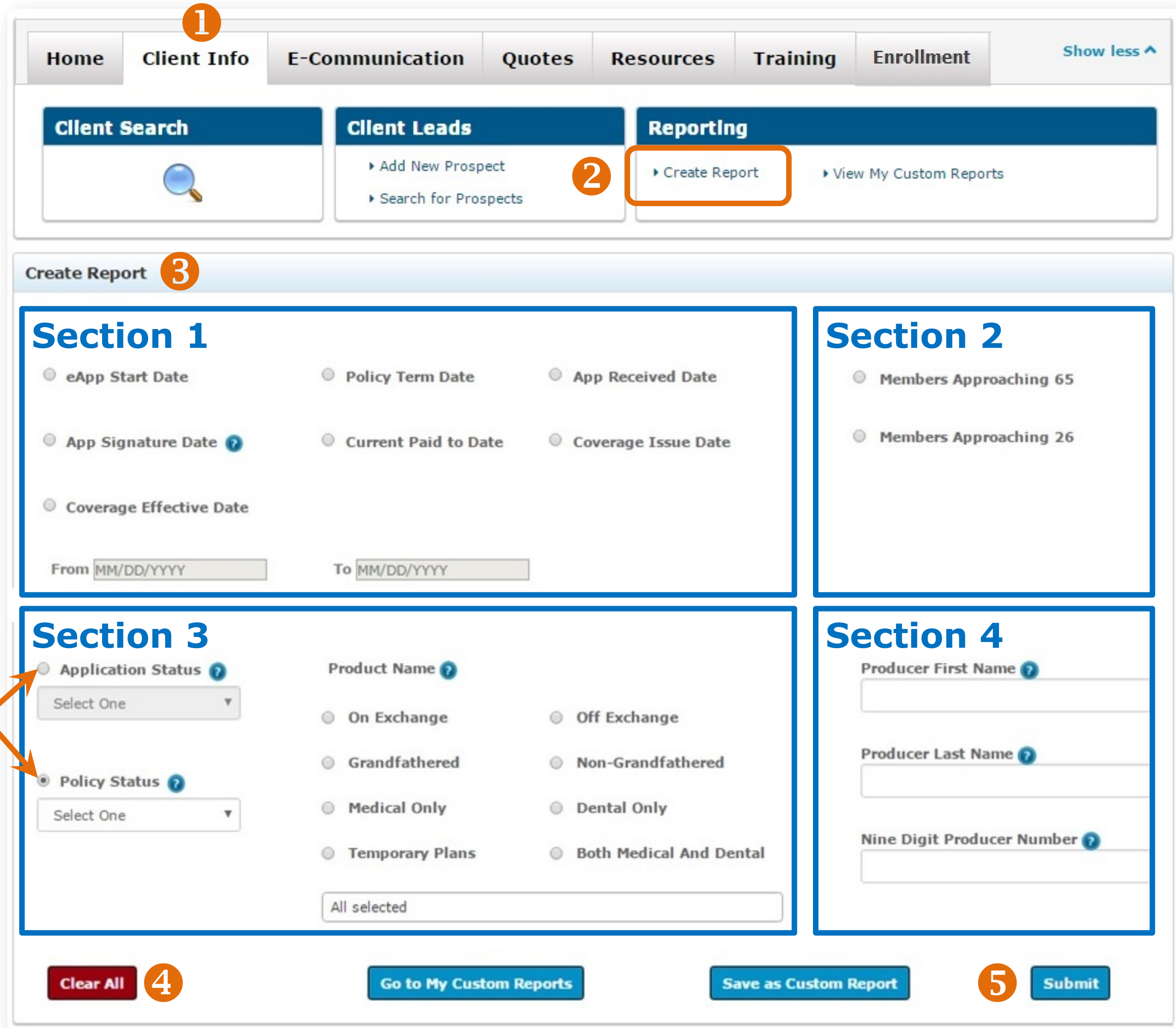
The reporting functions in the Retail Producer Portal continue to expand.

Producers can choose from a variety of options to create and run reports.

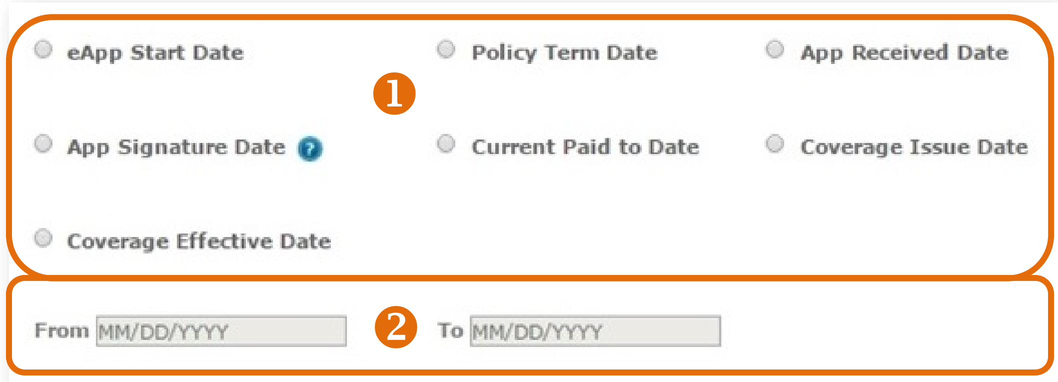
In addition, producers can save the report parameters and view them at any time.

Select Report Options

1. Click on "Client Info."
2. Select the "Create Report" link in the Reporting section.
3. Create a report by selecting parameters in one of the reporting sections. See the following pages for details on each report type, which are divided into four types of reports:
    - **Section 1: Date-Driven Reports (page 3)**
    - **Section 2: Retention Reports (page 3)**
    - **Section 3: Application Status Reports and Policy Status Reports (pages 4 and 5)**
    - **Section 4: Producer Reports (page 5)**
4. Click the "Clear All" button to remove all selections made on the page.
5. Click the "Submit" button to pull the report using the report parameters you selected.



Section 1: Date-Driven Reports



1. Select one option from the following report types:
   - eAPP START DATE: displays information about electronic applications that have been started.
   - POLICY TERM DATE: displays the dates that member policies were terminated due to a variety of reasons, including non-payment.
   - APP RECEIVED DATE: displays all applications received within a date range.
   - APP SIGNATURE DATE: displays the dates members signed their applications.
   - CURRENT PAID TO DATE: displays the "paid to" dates of member policies.
   - COVERAGE ISSUE DATE: displays all applications issued within a date range.
   - COVERAGE EFFECTIVE DATE: displays the dates member policies become effective.
2. Enter a "From" and/or "To" date. There's a convenient dropdown calendar for selecting these dates. If you do not select a "To" date, today's date will be applied.
3. Click on the "Submit" button. Note that only the primary applicant data is pulled.

Section 2: Retention Reports

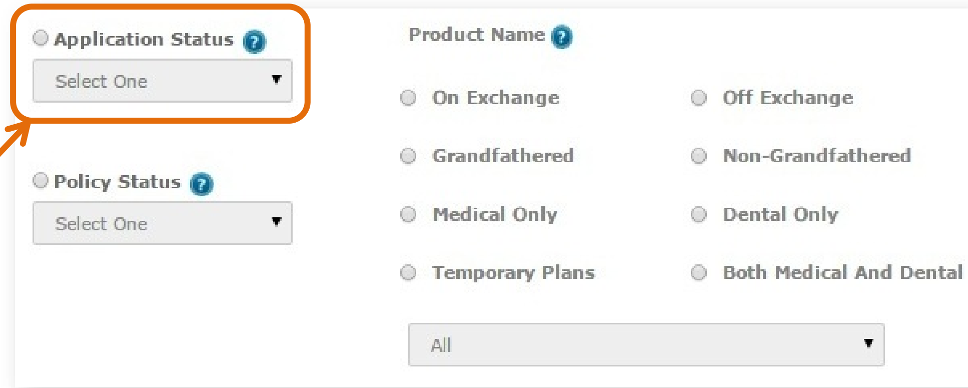
1. Select one option to view those who might be ready for a new policy.
   - The MEMBERS APPROACHING 65 report displays members turning 65 years of age within the next 365 days. Both primary and spouse data are pulled. Help keep members Blue by finding these members a Medicare Supplement, MAPD or PDP policy.
   - The MEMBERS APPROACHING 26 report displays members who are turning 26 within the next 365 days. Members approaching 26 that are on family policies as dependents will need their own individual policies.
2. Click on the "Submit" button.

Section 3: Application Status Reports

For application reports, select the "Application Status" radio button, choose one of the following from its dropdown menu and click on the "Submit" button. Dropdown options include:

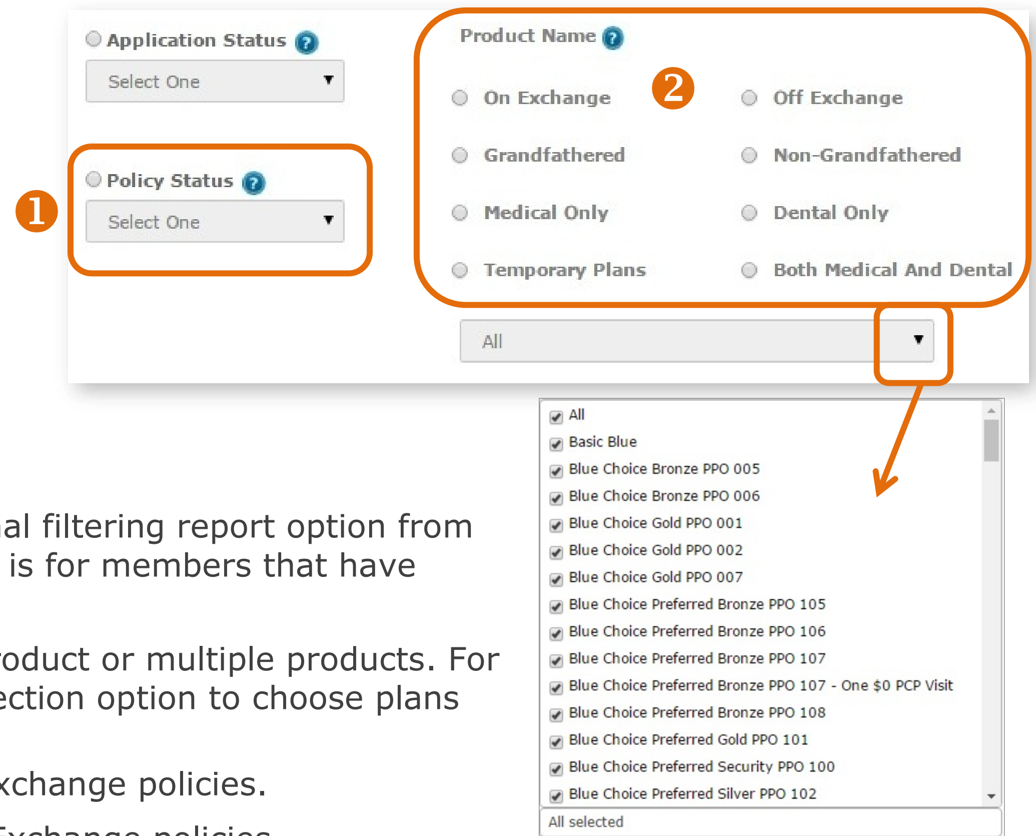
- All
- Started
- Pending / In Progress
- Withdrawn

Note: Only primary applicant data is pulled.
In addition, Application Status reports are for those that have **not been effectuated**.



Section 3: Policy Status Reports

1. For policy reports, select the "Policy Status" radio button and select one of the following from its dropdown menu:
   - All
   - Grace Period
   - Termed
   - Active
   - Missing Binder Payment



2. You can select (but are not required to) an additional filtering report option from the "Product Name" section if you like. This section is for members that have been effectuated. Options include:
   - Use the "All" pull down menu to select one product or multiple products. For example, you could use the multiple plan selection option to choose plans for a specific metallic, network or plan type.
   - ON EXCHANGE: displays members with On Exchange policies.
   - OFF EXCHANGE: displays members with Off Exchange policies.

- GRANDFATHERED: displays members with a non QHP policy. Options will populate for states with active members.
- NON-GRANDFATHERED: displays members with a QHP policy but it is not a metallic policy. Options will populate for states with active members.
- MEDICAL ONLY: displays members who only have medical policies, not dental policies.
- DENTAL ONLY: shows members who only have dental policies, not medical policies.
- TEMPORARY PLANS: displays members who have temporary (short-term) policies
- BOTH MEDICAL AND DENTAL: displays members who have a medical and dental policy.

NOTE: All of these options are available for "Policy Status" reports only. You must select from the "Policy Status" dropdown menu before you can choose an additional filtering option from the "Product Name" section.

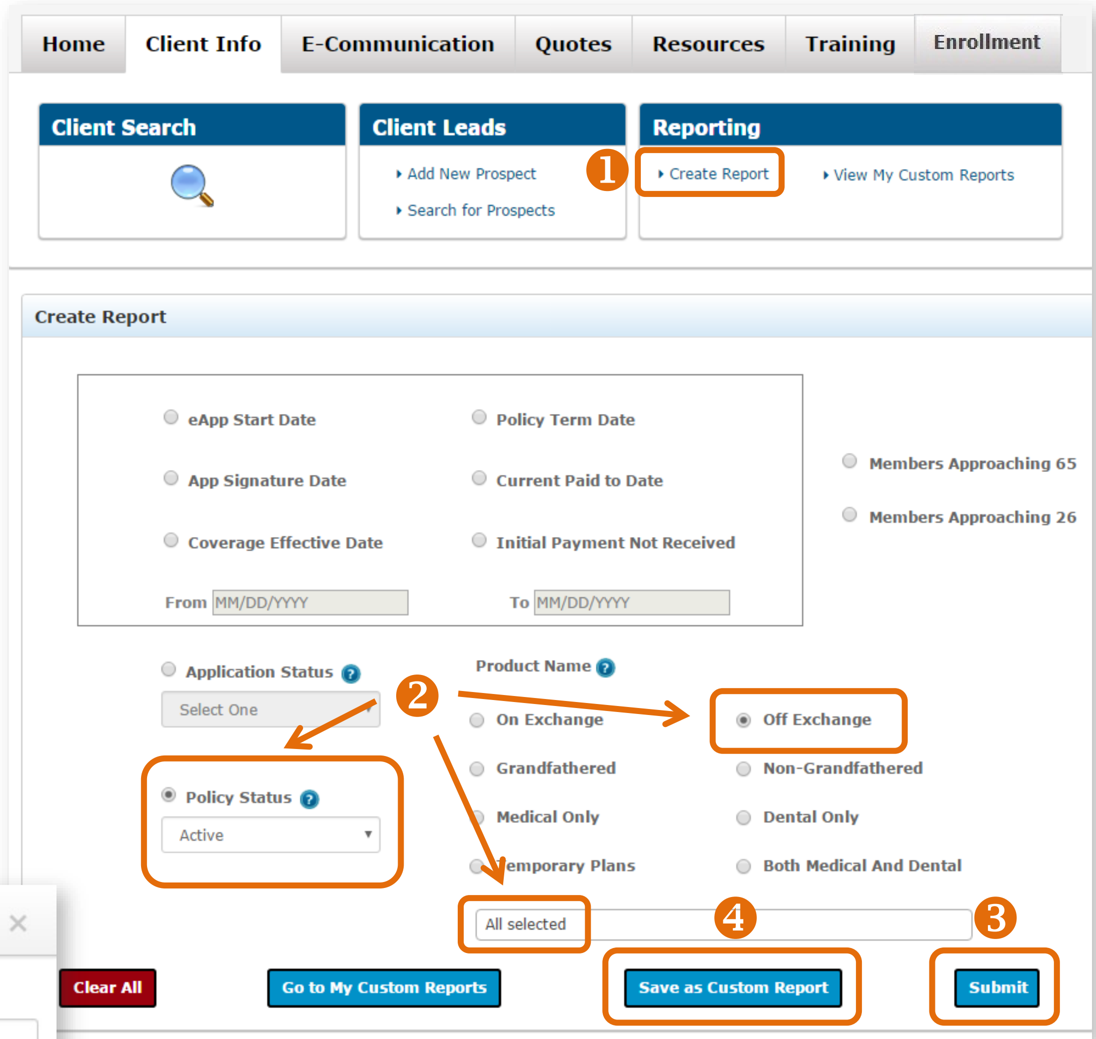
3. Click on the "Submit" button.

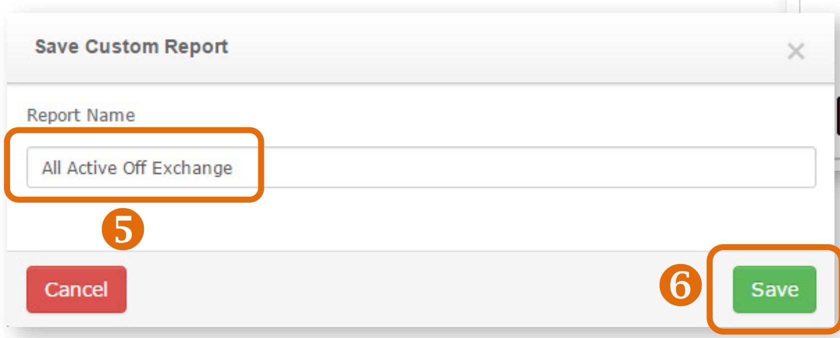
Section 4: Producer Reports

The options for this report only displays for General Agents and Agencies. Subproducers don't have access to these reports. Select report options for Section 1, 2 or 3 and then enter producer/subproducer data in Section 4 to see producer-specific reports. For example, to pull active members for a specific producer or subproducer, select "Policy Status" from Section 3, then "Active" in the dropdown menu and enter a subproducer's nine-digit ID number.

Create & 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.

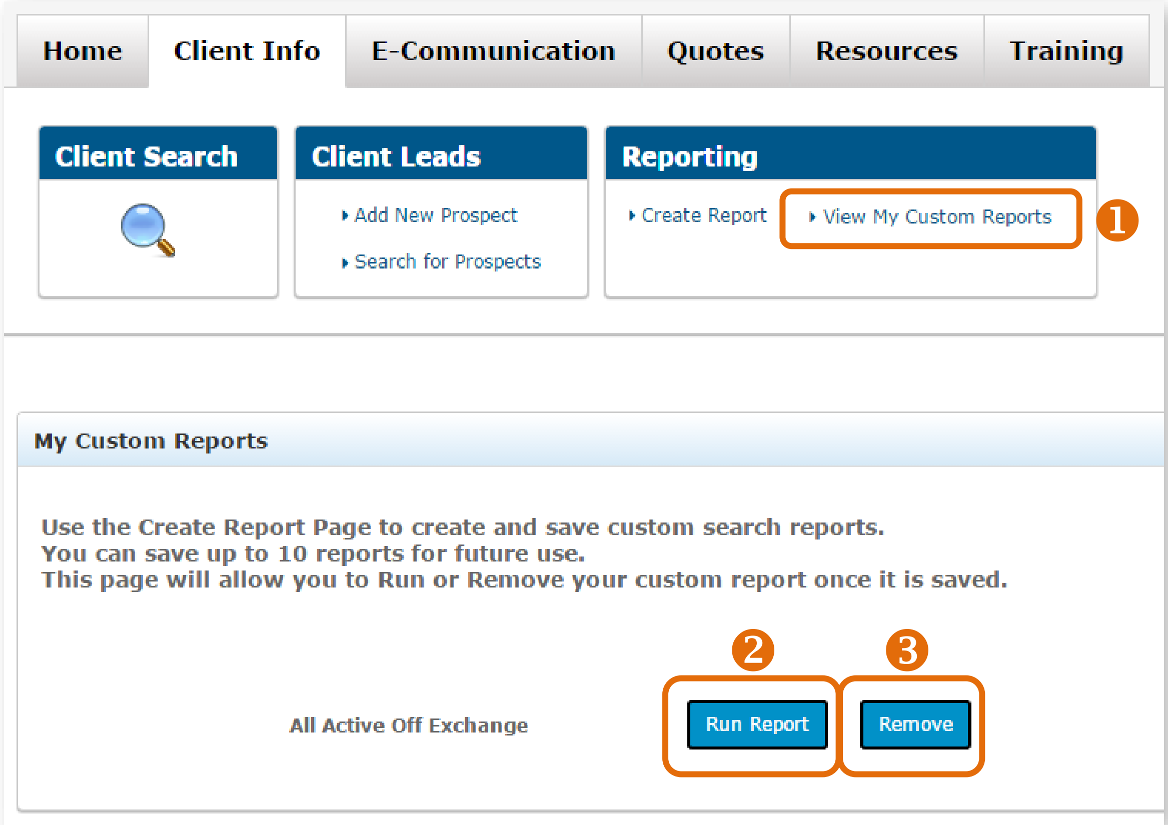




View Custom Reports

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

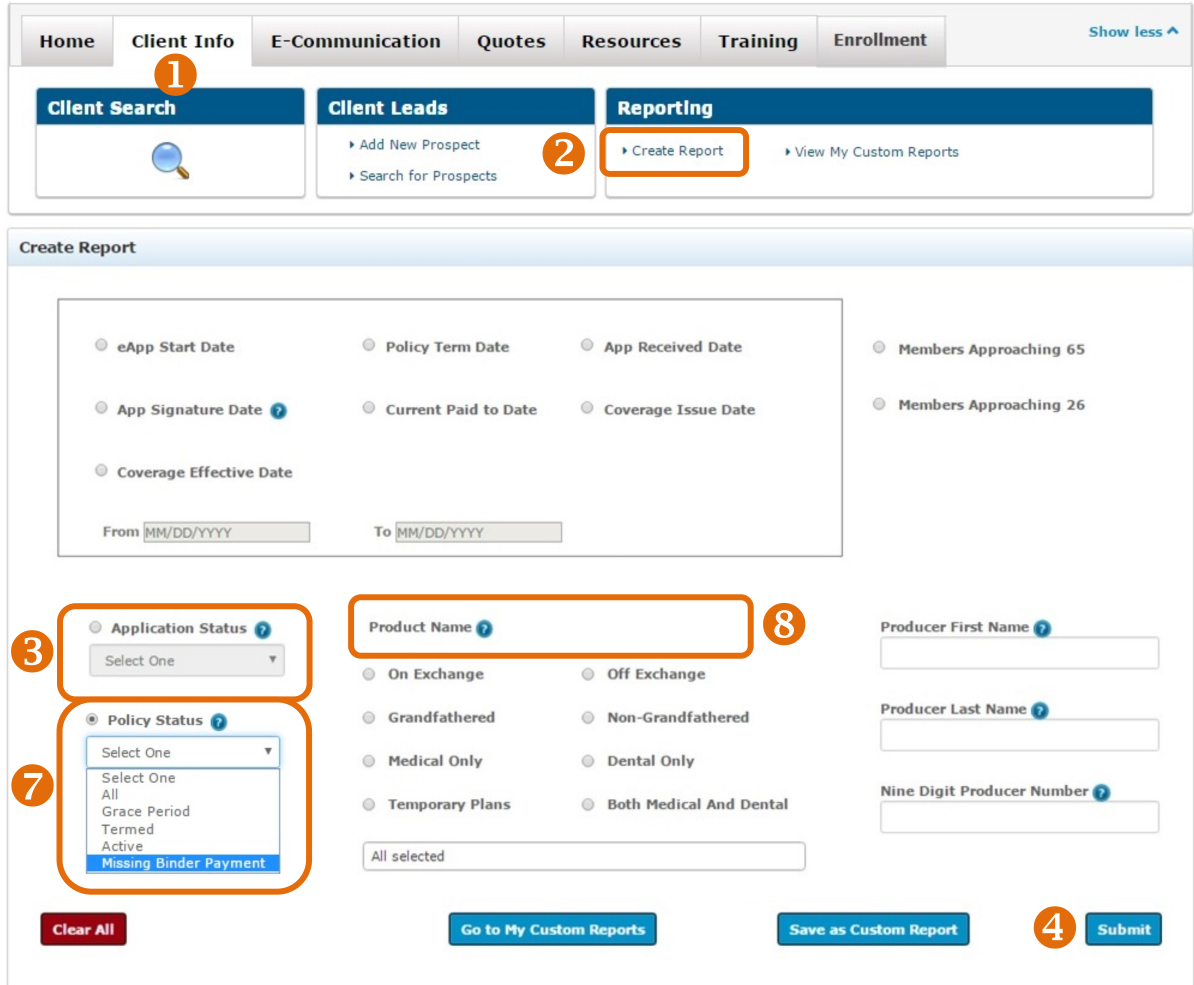
1. Select "View My Custom Reports" from the Reporting section of the Client Info tab.
2. Click on the "Run Report" button to see refreshed data.
3. If you've saved 10 reports and need to save another, one saved report will need to be deleted by clicking on the "Remove" button before a new report can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



Examples of Frequently Used Reports

Pending Applications and Applications Needing Binder/Initial Payment

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 page 10 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.

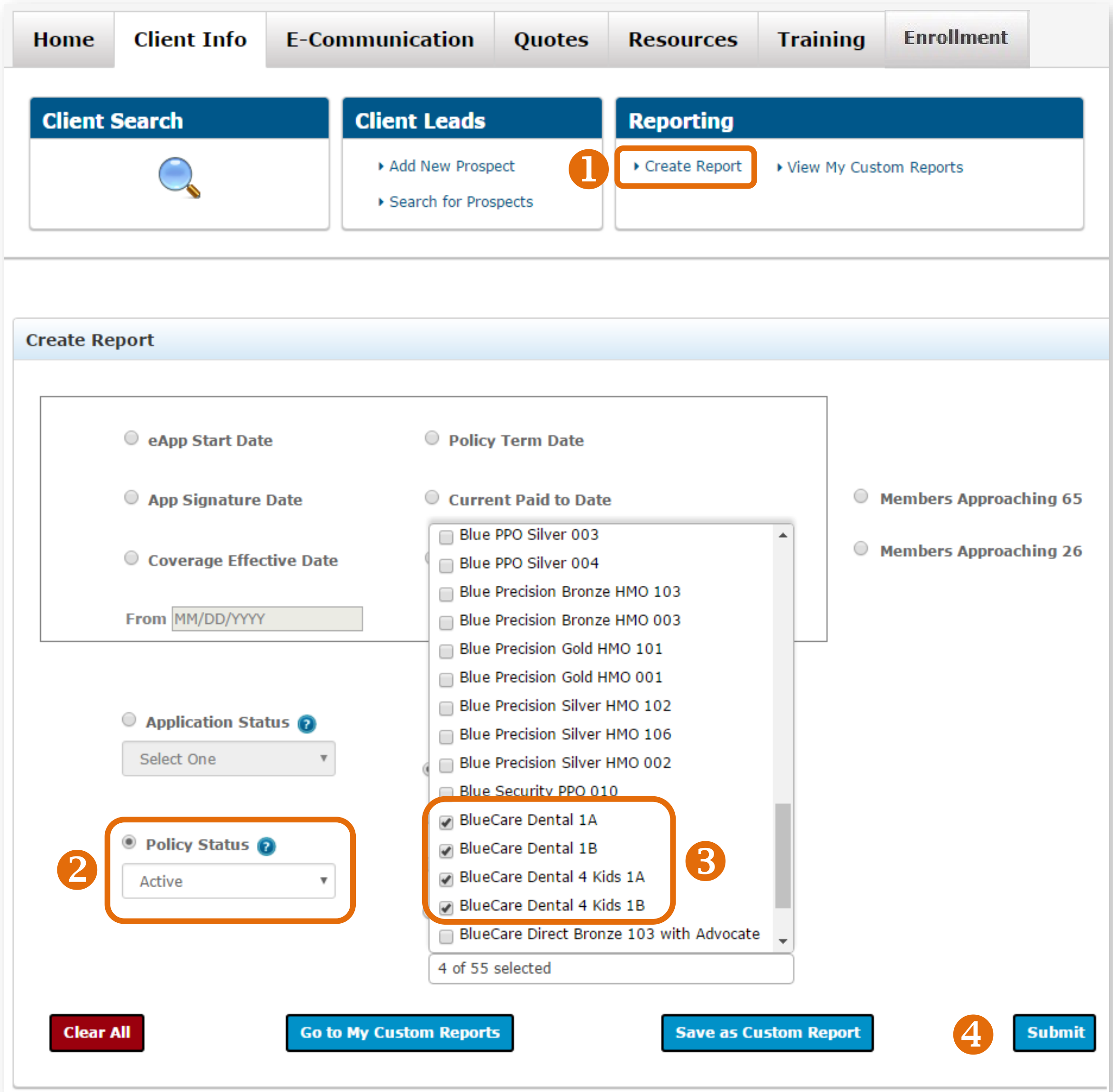
Examples of Frequently Used Reports (continued)

Multiple Plan Names

You can select as many or as few plan names as needed from the product name drop down list for a report.

1. Select the "Create Report" link from the Reporting section of the Client Info tab.
2. Select "Policy Status" and choose, from the drop down list: All, Grace Period, Termed, Active or Missing Binder Payment.
3. Click on the product name drop down list. Select multiple plan names. In this example, all dental plans are chosen. You could use this feature to select by metallic level, network, product type and much more.
4. Click the "Submit" button.

You can select as many or as few plan names as needed from the drop down list. What 's more, you can save the report parameters and run the report in the future at any time.

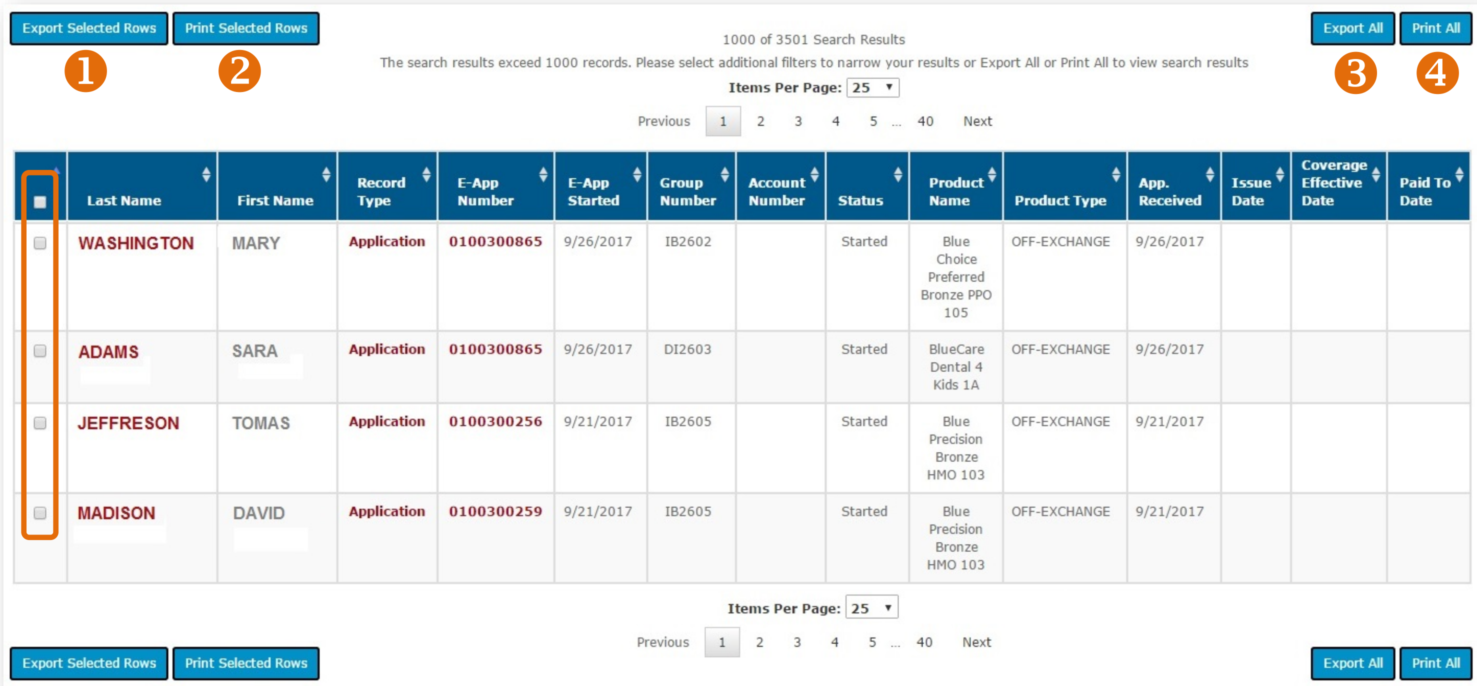


Exporting Reports

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.



	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
	WASHINGTON	MARY	Application	0100300865	9/26/2017	IB2602		Started	Blue Choice Preferred Bronze PPO 105	OFF-EXCHANGE	9/26/2017			
	ADAMS	SARA	Application	0100300865	9/26/2017	DI2603		Started	BlueCare Dental 4 Kids 1A	OFF-EXCHANGE	9/26/2017			
	JEFFRESON	TOMAS	Application	0100300256	9/21/2017	IB2605		Started	Blue Precision Bronze HMO 103	OFF-EXCHANGE	9/21/2017			
	MADISON	DAVID	Application	0100300259	9/21/2017	IB2605		Started	Blue Precision Bronze HMO 103	OFF-EXCHANGE	9/21/2017			

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.