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# 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.

The screenshot shows the 'Reporting' section of the BlueCross BlueShield Retail Producer Portal. At the top, there is a navigation bar with links: Home, Client Info, E-Communication, Quotes, Resources, Training, and Enrollment. Below this, there are three main tabs: Client Search, Client Leads, and Reporting. The Reporting tab is active, showing options to 'Create Report' and 'View My Custom Reports'. Below the tabs, there is a 'Create Report' section with various filters. These include: eApp Start Date, App Signature Date, Coverage Effective Date, Policy Term Date, Current Paid to Date, App Received Date, Coverage Issue Date, Members Approaching 65, and Members Approaching 26. There are also dropdown menus for Application Status and Policy Status, and radio buttons for Product Name (On Exchange, Off Exchange, Grandfathered, Non-Grandfathered, Medical Only, Dental Only, Temporary Plans, Both Medical And Dental). At the bottom, there are buttons for 'Clear All', 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit'.

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# 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.

The screenshot displays the 'Create Report' interface. At the top, a navigation bar includes 'Home', 'Client Info' (marked with a circled 1), 'E-Communication', 'Quotes', 'Resources', 'Training', and 'Enrollment'. Below this, a 'Reporting' section contains a 'Create Report' link (marked with a circled 2) and a 'View My Custom Reports' link. The main area is titled 'Create Report' (marked with a circled 3) and is divided into four sections: Section 1 (Date-Driven Reports), Section 2 (Retention Reports), Section 3 (Application Status and Policy Status Reports), and Section 4 (Producer Reports). Section 3 is highlighted with an orange arrow. At the bottom, there are four buttons: 'Clear All' (marked with a circled 4), 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit' (marked with a circled 5).

## 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.

☐ eApp Start Date      ☐ Policy Term Date      ☐ App Received Date

☐ App Signature Date      ☐ Current Paid to Date      ☐ Coverage Issue Date

☐ Coverage Effective Date

From  To

## 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.

☐ Members Approaching 65

☐ Members Approaching 26

## 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**.

Application Status ?  
Select One

Policy Status ?  
Select One

Product Name ?

☐ On Exchange ☐ Off Exchange

☐ Grandfathered ☐ Non-Grandfathered

☐ Medical Only ☐ Dental Only

☐ Temporary Plans ☐ Both Medical And Dental

All

## 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.

Application Status ?  
Select One

Policy Status ?  
Select One

Product Name ?

☐ On Exchange ☐ Off Exchange

☐ Grandfathered ☐ Non-Grandfathered

☐ Medical Only ☐ Dental Only

☐ Temporary Plans ☐ Both Medical And Dental

All

☒ All

☒ Basic Blue

☒ Blue Choice Bronze PPO 005

☒ Blue Choice Bronze PPO 006

☒ Blue Choice Gold PPO 001

☒ Blue Choice Gold PPO 002

☒ Blue Choice Gold PPO 007

☒ Blue Choice Preferred Bronze PPO 105

☒ Blue Choice Preferred Bronze PPO 106

☒ Blue Choice Preferred Bronze PPO 107

☒ Blue Choice Preferred Bronze PPO 107 - One \$0 PCP Visit

☒ Blue Choice Preferred Bronze PPO 108

☒ Blue Choice Preferred Gold PPO 101

☒ Blue Choice Preferred Security PPO 100

☒ Blue Choice Preferred Silver PPO 102

All selected

- 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.

A screenshot of a web form titled "Producer Reports". It contains three input fields, each with a label and a help icon (a blue circle with a white question mark). The first field is labeled "Producer First Name", the second is "Producer Last Name", and the third is "Nine Digit Producer Number". Each field is a simple rectangular text box.

Producer First Name ?

Producer Last Name ?

Nine Digit Producer 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.

The screenshot displays the 'Create Report' interface within a web application. The top navigation bar includes tabs: Home, Client Info, E-Communication, Quotes, Resources, Training, and Enrollment. The 'Client Info' tab is active, showing three sub-sections: Client Search, Client Leads, and Reporting. The 'Reporting' section contains a 'Create Report' link, highlighted with an orange box and labeled '1'. Below this, the 'Create Report' form is visible. It includes several sections for selecting parameters: '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 pickers for 'From' and 'To' (MM/DD/YYYY). The 'Application Status' section has a 'Select One' dropdown, highlighted with an orange box and labeled '2'. The 'Policy Status' section has a dropdown set to 'Active', also highlighted with an orange box and labeled '2'. The 'Product Name' section has a dropdown set to 'Off Exchange', highlighted with an orange box and labeled '2'. Below these, there are radio buttons for 'On Exchange', 'Grandfathered', 'Medical Only', 'Temporary Plans', 'Non-Grandfathered', 'Dental Only', and 'Both Medical And Dental'. The 'All selected' button is highlighted with an orange box and labeled '4'. The 'Submit' button is highlighted with an orange box and labeled '3'. The 'Save as Custom Report' button is highlighted with an orange box and labeled '4'. A 'Clear All' button is also present. A 'Save Custom Report' pop-up box is overlaid on the bottom left, showing a 'Report Name' field with the text 'All Active Off Exchange' highlighted with an orange box and labeled '5'. The 'Cancel' button is highlighted with an orange box and labeled '6', and the 'Save' button is highlighted with an orange box and labeled '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.

The screenshot displays a software interface with a top navigation bar containing tabs: Home, Client Info, E-Communication, Quotes, Resources, and Training. Below this, there are three main sections: Client Search (with a magnifying glass icon), Client Leads (with links for 'Add New Prospect' and 'Search for Prospects'), and Reporting (with links for 'Create Report' and 'View My Custom Reports'). The 'View My Custom Reports' link is highlighted with an orange box and a circled '1'. Below these sections is a 'My Custom Reports' panel. It contains instructional text: 'Use the Create Report Page to create and save custom search reports. You can save up to 10 reports for future use. This page will allow you to Run or Remove your custom report once it is saved.' At the bottom of this panel, the text 'All Active Off Exchange' is displayed. To the right of this text are two buttons: 'Run Report' and 'Remove'. Both buttons are highlighted with orange boxes and circled numbers '2' and '3' respectively.



# 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.

The screenshot shows the 'Create Report' interface with the following elements and numbered callouts:

- 1**: 'Client Info' tab in the top navigation bar.
- 2**: 'Create Report' link in the 'Reporting' section.
- 3**: 'Application Status' dropdown menu.
- 4**: 'Submit' button at the bottom right.
- 5**: 'Export' button (labeled 'Go to My Custom Reports' in the image).
- 6**: 'Repeat steps 1 and 2 above' (not a UI element, but a step instruction).
- 7**: 'Policy Status' dropdown menu.
- 8**: 'Product Name' section with various filtering options.
- 9**: 'Repeat steps 4 and 5' (not a UI element, but a step instruction).

The interface includes sections for date ranges (eApp Start Date, Policy Term Date, App Received Date, App Signature Date, Current Paid to Date, Coverage Issue Date, Coverage Effective Date), application status, policy status, and product name filtering. It also features buttons for 'Clear All', 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit'.



## 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.

The screenshot displays the 'Create Report' form within the 'Client Info' tab. The 'Reporting' section is active, showing the 'Create Report' link (1). The 'Policy Status' dropdown is set to 'Active' (2). The 'Product Name' dropdown is open, showing a list of plans, with 'BlueCare Dental 1A', 'BlueCare Dental 1B', 'BlueCare Dental 4 Kids 1A', and 'BlueCare Dental 4 Kids 1B' selected (3). The 'Submit' button is at the bottom right (4).

**Client Info Tab - Reporting Section:**

- 1. Create Report
- View My Custom Reports

**Create Report Form:**

- Policy Status:** Active (2)
- Product Name:** BlueCare Dental 1A, BlueCare Dental 1B, BlueCare Dental 4 Kids 1A, BlueCare Dental 4 Kids 1B (3)
- Buttons:** Clear All, Go to My Custom Reports, Save as Custom Report, Submit (4)

# 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 web application interface for viewing search results. At the top, there are two buttons: "Export Selected Rows" (labeled 1) and "Print Selected Rows" (labeled 2). The main content area displays a table of search results. The table has 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 first four rows of data are visible, each with a checkbox in the first column. The first row is for WASHINGTON, MARY. The second row is for ADAMS, SARA. The third row is for JEFFRESON, TOMAS. The fourth row is for MADISON, DAVID. At the bottom of the table, there are two buttons: "Export All" (labeled 3) and "Print All" (labeled 4). The interface also includes a pagination bar with "Previous", "1", "2", "3", "4", "5", "...", "40", and "Next".

	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			