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Retail Producer Portal Guide: Using Reports

The Retail Producer Portal is a comprehensive sales and service tool for the Under 65 individual market and the Medicare markets. The portal enables you to design and deliver quotes, enroll members in Blue plans, manage prospects and serve and support active clients with a host of features. [This section covers how to use powerful reporting functions.](#)

Using Reports

- [Select Report Options.....](#) 3
- [Create & Save Custom Reports.....](#) 9
- [View Custom Reports](#) 10
- [Examples of Frequently Used Reports.....](#) 11
- [Using Book of Business Reports.....](#) 13
- [Exporting Reports](#) 14

Using Reports

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.

This section of the guide covers the following:

- Select Report Options
- Creating and Saving Custom Reports
- Viewing Custom Reports
- Examples of Frequently Used Reports
- Using Book of Business (Agencies only)

The screenshot displays the Reporting section of the Retail Producer Portal. The top navigation bar includes Home, Client Info, E-Communication, Quotes, Resources, Training, and Enrollment. Below this 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, View My Custom Reports, and Book of Business). The main content area contains various filters: Application Status (radio buttons), Policy Status (radio buttons with a dropdown showing 'All selected (4)'), Coverage Effective Date (checkboxes and date pickers), Current Paid to Date (checkboxes and date pickers), Policy Term Date (checkboxes and date pickers), Product Type (dropdown showing 'All selected (4)'), Renewal Indicator (dropdown showing 'All selected (5)'), Member Approaching (checkboxes for Age 65 and Age 26, and a date picker), Select a Plan (dropdown showing 'All selected (170)'), and Members Receiving APTC (checkboxes for Yes and No). On the right side, there are input fields for Producer First Name, Producer Last Name, and Nine Digit Producer Number. At the bottom, there are buttons for Clear All, Go to My Custom Reports, Save as Custom Report, and Submit.

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 two types of reports:
 - ✓ **Section 1:** Application Status Report
 - ✓ **Section 2:** Policy Status Reports
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 shows the 'Reporting' section of the Retail Producer Portal. At the top, a navigation bar includes 'Home', 'Client Info', 'E-Communication', 'Quotes', 'Resources', 'Training', and 'Enrollment'. A 'Show less' link is on the right. Below the navigation bar are three main sections: 'Client Search', 'Client Leads', and 'Reporting'. The 'Reporting' section is highlighted with a blue border and contains links for 'Create Report', 'Book of Business', and 'View My Custom Reports'. A callout '1' points to the 'Client Info' tab. A callout '2' points to the 'Create Report' link. Below the navigation bar is a section titled 'For Pending Application Status' with instructions and links. Below that is a section with two radio buttons: 'Application Status' (labeled 'Section 1') and 'Policy Status' (labeled 'Section 2'). A callout '3' points to this section. At the bottom, there are four buttons: 'Clear All' (callout '4'), 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit' (callout '5'). On the right side, there is a form with three input fields: 'Producer First Name', 'Producer Last Name', and 'Nine Digit Producer Number'.

Section 1: Application Status Reports

Application Status reports display primary applicants not yet effectuated.

1. Click the "Application Status" radio button, choose one of the following from its dropdown menu.

- All
- Started
- Pending / In Progress (typically, these clients have not yet paid the first month's premium OR haven't supplied proper special enrollment validation documents)
- Withdrawn

**Note: Once you click the "Application Status" radio button, additional filtering options will be displayed. You can select one or more (but you are not required to) filters to narrow your search.

2. App Received Date – displays all applications received within a date range.

- You can enter a "From" and/or "To" date. If you do not select a "To" date, today's date will be applied.

3. Coverage Effective Date – displays the dates member policies become effective.

- You can enter a "From" and/or "To" date. If you do not select a "To" date, today's date will be applied.

4. Product Type – the dropdown menu will default to "All selected" Product Type, you have the option to select a different Product Type from the following dropdown menu options:

- All Selected – displays members with both On and Off Exchange policies.
- On Exchange – displays members with On Exchange policies.
- Off Exchange – displays members with Off Exchange policies.

5. Select a Plan – Based on the "Product Type" selected, eligible Medical and Dental plans will be displayed in the "Select a Plan" dropdown menu. You can select to filter by a specific plan name or select all plans Medical and/or Dental.

- All Selected – includes all medical plans and all dental plans.
- Medical -- includes all medical plans (no dental plans).
- Dental – includes all dental plans (no medical plans).

6. Producer Search – the following producer related search parameters only display for General Agents and Agencies. (Sub producers do not have access to these search parameters.) These search parameters are optional fields and can be used to search for reports for a specific producer or sub-producer. (Note - please select the radio button for either Application Status or Policy Status first, then enter the producer or sub-producer information. IF you enter the producer information prior to selecting the Application Status or Policy Status radio button, the fields will be automatically cleared, and you will have to re-enter the producer information again.)

- Producer First Name
- Producer Last Name
- Nine Digit Producer Number

7. Click submit

8. Clear All

Section 2: Policy Stats Reports

Policy Status reports display members that have been effectuated.

1. Click the “Policy Status” radio button, choose one of the following from the dropdown menu:

- All
- Grace Period
- Termed
- Active
- Missing Binder Payment

**Note: once you click the “Policy Status” radio button, additional filtering options will be displayed. You can select (but are not required to) one or more additional filters to narrow your search.

2. Coverage Effective Date – displays the dates member policies become effective.

- You can enter a “From” and/or “To” date. If you do not select a “To” date, today’s date will be applied.

3. Current Paid to Date – displays the “paid to” dates of member policies.

4. Policy Term Date - displays the dates member policies were terminated due to a variety of reasons, including non-payment.

5. Product Type –the dropdown menu will default to “All selected” Product Type, you have the option to select a different Product Type from the following dropdown menu options:

- All Selected – displays members with both On and Off Exchange policies.
- 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.

The screenshot displays the 'Reporting' section of the Retail Producer Portal. The 'Policy Status' radio button is selected, and the dropdown menu shows 'All selected (4)'. The 'Coverage Effective Date' filter is set to 'From MM/DD/YYYY' and 'To MM/DD/YYYY'. The 'Current Paid to Date' filter is set to 'From MM/DD/YYYY' and 'To MM/DD/YYYY'. The 'Policy Term Date' filter is set to 'From MM/DD/YYYY' and 'To MM/DD/YYYY'. The 'Product Type' filter is set to 'All selected (4)'. The 'Renewal Indicator' filter is set to 'All selected (5)'. The 'Member Approaching' filter is set to 'Age 65' and 'Age 26' with a date input field 'MM/DD/YYYY'. The 'Members Receiving APTC' filter is set to 'No'. The 'Producer First Name', 'Producer Last Name', and 'Nine Digit Producer Number' fields are empty. The 'Clear All' button is highlighted in red. The 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit' buttons are highlighted in blue.

- Non-Grandfathered – displays members with a QHP policy but is not a metallic policy. Options will populate for states with active members.
 - Current Paid to Date – displays the “paid to” dates of member policies.
6. Select a Plan – Based on the “Product Type” selected, eligible Medical and Dental plans will be displayed in the “Select a Plan” dropdown menu. You can select to filter by a specific plan name or select all plans Medical and/or Dental.
- All Selected – includes all medical plans and all dental plans.
 - Medical – includes all medical plans (no dental plans).
 - Dental – includes all dental plans (no medical plans).
7. Renewal Indicator – displays information on both renewals and new sales. Options include:
- All
 - Active (all active renewals)
 - CMS (passive renewals from CMS, most likely on-exchange plans submitted via healthcare.gov)
 - HCSC (passive renewals from our organization)
 - None (not a renewal at all, but a new application/sale)
 - Blank (renewal type not known or not available)
8. Member Approaching – allows you to search for members approaching age-off limitations. Select one or both of the following options to view those who might be ready for a new policy. Note: Search Date defaults to 365 days in the future unless otherwise specified in the date field.
- 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 policy, Medicare Advantage with Prescription Drug coverage policy (MAPD) and/or stand-alone Prescription Drug Plan (PDP).
 - The MEMBERS APPROACHING 26 report - displays members who are turning 26 within the next 365 days. Members approaching 26 who are on family policies as dependents will need their own individual policies.
9. Members Receiving APTC – allows you the option to search for members that receive an Advanced Premium Tax Credit for their On Exchange plan. Select one of the following options:
- Yes
 - No
10. Producer Search –the following producer related search parameters only display for General Agents and Agencies. (Sub-producers do not have access to these search parameters.) These search parameters are optional fields and can be used to search for reports for a specific producer or sub-producer. (Note – please select the radio button for either Application Status or Policy Status first, then enter the producer or sub-producer information. If you enter the

producer information prior to selecting the Application Status or Policy Status radio button, the fields will be automatically cleared, and you will have to re-enter the producer information again.)

- Producer First Name
- Producer Last Name
- Nine Digit Producer Number

- 11.** Click Submit – once you have made all your selections using the search parameters to run the report.
- 12.** Clear All – will clear all search parameters.

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 shows the 'Reporting' section of the Client Info tab. The 'Reporting' sub-tab is active, and the 'Create Report' link is highlighted with a red circle and the number 1. Below this, various reporting parameters are visible, including 'Application Status' (set to 'Active' with a red circle and number 2), 'Coverage Effective Date', 'Current Paid to Date', 'Policy Term Date', 'Product Type' (set to 'Off Exchange'), 'Renewal Indicator' (set to 'All selected (5)'), and 'Member Approaching' (set to 'Age 65'). At the bottom right, the 'Submit' button is highlighted with a red circle and the number 3.

The screenshot shows a 'Save Custom Report' pop-up dialog. The 'Report Name' field contains the text 'All Active Off Exchange' and is highlighted with a red circle and the number 4. Below the field, the 'Cancel' button is on the left and the 'Save' button is on the right, both highlighted with red circles and the number 5. The 'Save' button is also highlighted with a red circle and the number 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 the Retail Producer Portal interface. At the top, there is a navigation bar with tabs for Home, Client Info, E-Communication, Quotes, Resources, and Training. Below this, there are three main sections: Client Search, Client Leads, and Reporting. The Reporting section is highlighted with a blue header and contains two buttons: 'Create Report' and 'View My Custom Reports'. The 'View My Custom Reports' button is circled in orange and labeled with a '1'. Below the Reporting section, there is a section titled 'My Custom Reports' with a light blue header. This section 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.' Below the text, there is a report entry titled 'All Active Off Exchange'. To the right of this entry are two buttons: 'Run Report' and 'Remove'. The 'Run Report' button is circled in orange and labeled with a '2', and the 'Remove' button is circled in orange and labeled with a '3'.

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.
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 'Reporting' section of the Retail Producer Portal. The interface includes a navigation bar with tabs for Home, Client Info, E-Communication, Quotes, Resources, Training, and Enrollment. The 'Reporting' section is active, showing options to 'Create Report' and 'View My Custom Reports'. The main content area contains several filters and options:

- Application Status:** A dropdown menu with 'Missing Binder Payment' selected (callout 3).
- Policy Status:** A dropdown menu with 'Missing Binder Payment' selected (callout 7).
- Product Type:** A dropdown menu with '2 selected' (callout 8).
- Renewal Indicator:** A dropdown menu with 'All selected (5)'.
- Member Approaching:** Radio buttons for 'Age 65' and 'Age 26'.
- Members Receiving APTC:** Radio buttons for 'Yes' and 'No'.
- Enrollment:** A section with input fields for 'Producer First Name', 'Producer Last Name', and 'Nine Digit Producer Number'.

At the bottom of the form, there are buttons for 'Clear All', 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit' (callout 4).

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 shows the 'Enrollment' tab in the Retail Producer Portal. The 'Reporting' section is active, with a callout '1' pointing to the 'Create Report' link. The 'Policy Status' dropdown is set to 'Active', with a callout '2' pointing to it. The 'Policy Term Date' dropdown is open, showing a list of dental plans with 'Dental' and four sub-plans selected, with a callout '3' pointing to the dropdown. The 'Submit' button is highlighted with a callout '4'. Other visible elements include the 'Clear All' button, 'Go to My Custom Reports' button, and 'Save as Custom Report' button.

Using Book of Business Reports

Book of Business reports are available to all General Agents and Agencies that have subproducers.

For General Agents and Agencies with this access, they can select the Book of Business link from the Reporting section of the Client Info tab. Other producers will not see the “Book of Business” link.

1. You can search and create reports for your entire book of business, including all states that you are registered for in RPP. You can also select to create a report for a specific state(s), regardless of which state you are logged in to.
2. You can search and create reports for a specific producer by using the producer's nine-digit producer number (as shown at right).
3. You can also search within your entire hierarchy.
4. Additional options allow you to include sub-producers, include dental business and filter by premium status. Filtering by premium status can be used for client outreach as non-payment can jeopardize coverage.
 - Only the first 1000 rows will display when the “Search” button is clicked. However, all results will be included when you click on the “Export All” or “Print All” buttons.

The screenshot displays the 'Book of Business Reporting' interface. At the top, there are navigation tabs: Home, Client Info, E-Communication, Quotes, Resources, Training, and Enrollment. Below these, there are three main sections: Client Search, Client Leads, and Reporting. The Reporting section is highlighted, and a red '1' points to the 'Book of Business' link. Below this, there is a 'Book of Business Reporting' section with several options: 'View my Entire Book of Business', 'Search by Nine Digit Producer Number' (with a search input field containing '111222333' and a red '2' next to it), and 'Search within My Hierarchy'. There are also checkboxes for 'Include Dental', 'Include Sub-Producers', and 'Filter by Premium Status'. A red '3' points to the 'Clear All' button. A red '4' with arrows points to the 'Filter by Premium Status' checkbox. Below the form, there is a table with 14 columns: Coverage State, Premium Status, Primary Last Name, Primary First Name, Account Number, Status, Product Name, Coverage Effective Date, Paid To Date, Term Date, Renewal Type, Producer Name, and Nine Digit Producer Number. The table shows two rows of data for Illinois (IL) with 'Initial Premium Not Received' status. The first row is for 'Doe, ARCHANA' with account number 11223445 and product 'Blue Choice Preferred Bronze PPO 202'. The second row is for 'Smith, DANIEL' with account number 5566778899 and product 'Blue Choice Preferred Bronze PPO 201'. The table has 269 search results and a 'Show 25 entries' dropdown.

Exporting Reports

It's easy to 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. 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.

The screenshot displays a web interface for a report. At the top, there is a message: "The search results exceed 1000 records. Please select Export All (or) Print All to view the entire book of business". Below this, there is a "Show 25 entries" dropdown and a pagination control with "Previous", "1", "2", "3", "4", "5", "...", "40", and "Next". A "1,000 Search Results" indicator is present. The main table has the following columns: Coverage State, Premium Status, Primary Last Name, Primary First Name, Account Number, Status, Product Name, Coverage Effective Date, Paid To Date, Term Date, Renewal Type, Producer Name, and Nine Digit Producer Number. The table contains several rows of data, including entries for BLUEQA, UATMTBROKER, UATMEJICO, PEARLY, JEFF, LEE, and KEN. At the bottom of the table, there is another "Show 25 entries" dropdown and a "1,000 Search Results" indicator. On the left side of the interface, there is a blue button labeled "Export Selected Rows" with a circled "1" next to it. On the right side, there is a blue button labeled "Export All" with a circled "2" next to it.

	Coverage State	Premium Status	Primary Last Name	Primary First Name	Account Number	Status	Product Name	Coverage Effective Date	Paid To Date	Term Date	Renewal Type	Producer Name	Nine Digit Producer Number
<input type="checkbox"/>	MT	Initial Premium Not Received	BLUEQA	BILLTEST	223009993	Grace Period	Blue Preferred Bronze PPO 103	06/01/2017	06/01/2017	06/01/2017	NONE		999999999
<input type="checkbox"/>	MT	Initial Premium Not Received	UATMTBROKER	UATHPS	738002690	Grace Period	Blue Preferred Silver PPO 101 - Three \$0 PCP Visits	05/01/2017	05/01/2017	05/01/2017	NONE		999999999
<input type="checkbox"/>	NM	Initial Premium Not Received	UATMEJICO	UATNUEVO	736748030	Grace Period	Blue Community Bronze HMO 101	04/01/2017	04/01/2017	04/01/2017	NONE		999999999
<input type="checkbox"/>	MT	Initial Premium Not Received	PEARLY	EVELYN	738003129	Grace Period	Blue Preferred Bronze PPO 006	01/01/2017	01/01/2017	01/01/2017	NONE		999999999
<input type="checkbox"/>	MT	Initial Premium Not Received	JEFF	JOHN	738003117	Grace Period	Blue Preferred Bronze PPO 006	01/01/2017	01/01/2017	01/01/2017	NONE		999999999
<input type="checkbox"/>	MT	Initial Premium Not Received	LEE	KEVIN	738003115	Grace Period	Blue Preferred Bronze PPO 006	01/01/2017	01/01/2017	01/01/2017	NONE		999999999
<input type="checkbox"/>	MT	Initial Premium Not Received	KEN	ROCKY	738003113	Grace Period	Blue Preferred Bronze PPO 006	01/01/2017	01/01/2017	01/01/2017	NONE		999999999