OCTOBER 20, 2023

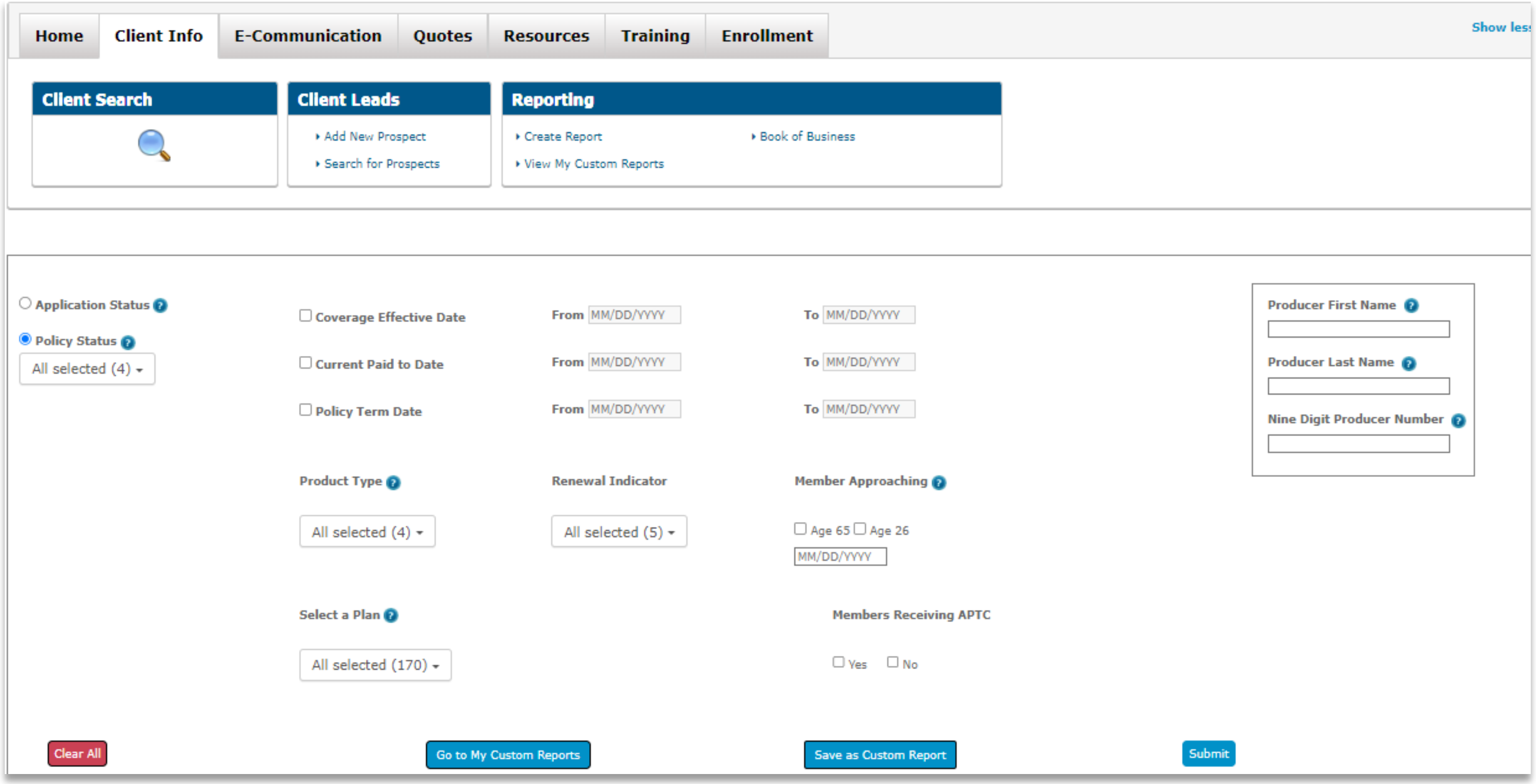
Retail Producer Portal Guide: Using Reports

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

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.

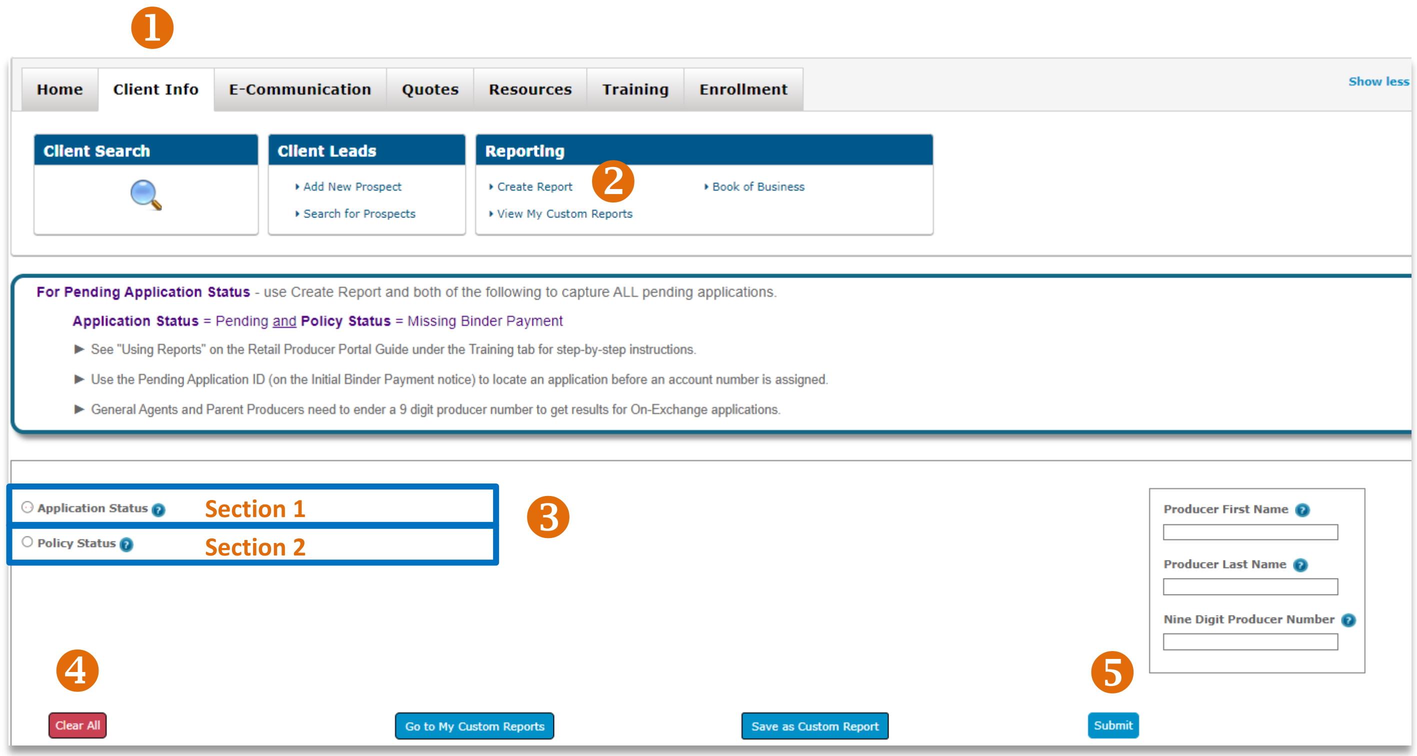


This section of the guide covers the following:

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

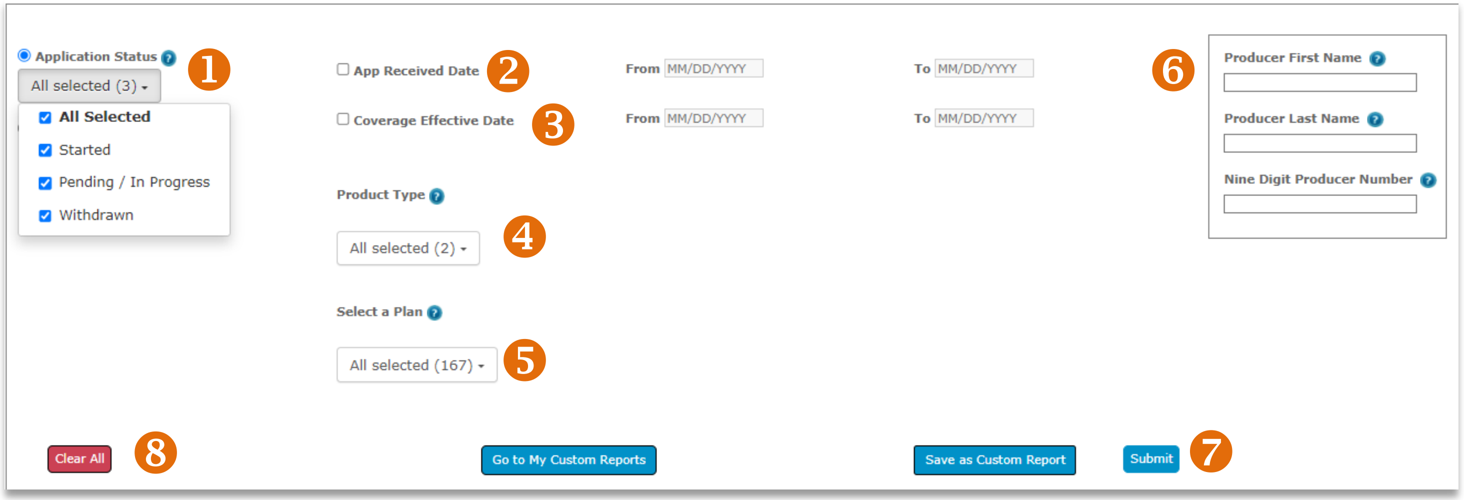
Select Report Options

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.



Section 1: Application Status Reports

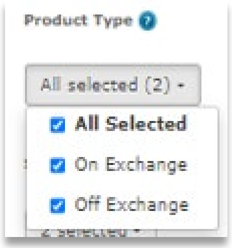
Application Status reports display primary applicants not yet effectuated.

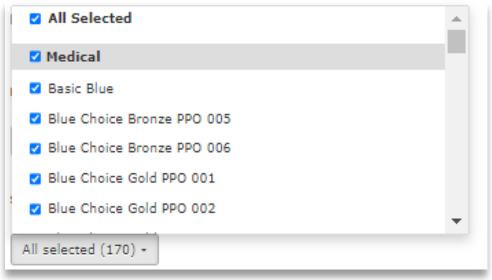


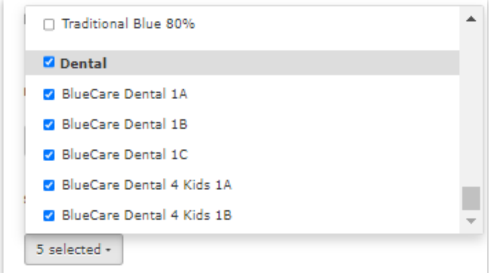
1. Click the “Application Status” radio button, choose one of the following from its dropdown menu.
   - All
   - Started
   - Pending / In Progress (typically, these clients have not yet paid the first month’s premium OR haven’t supplied proper special enrollment validation documents)
   - Withdrawn

   **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.





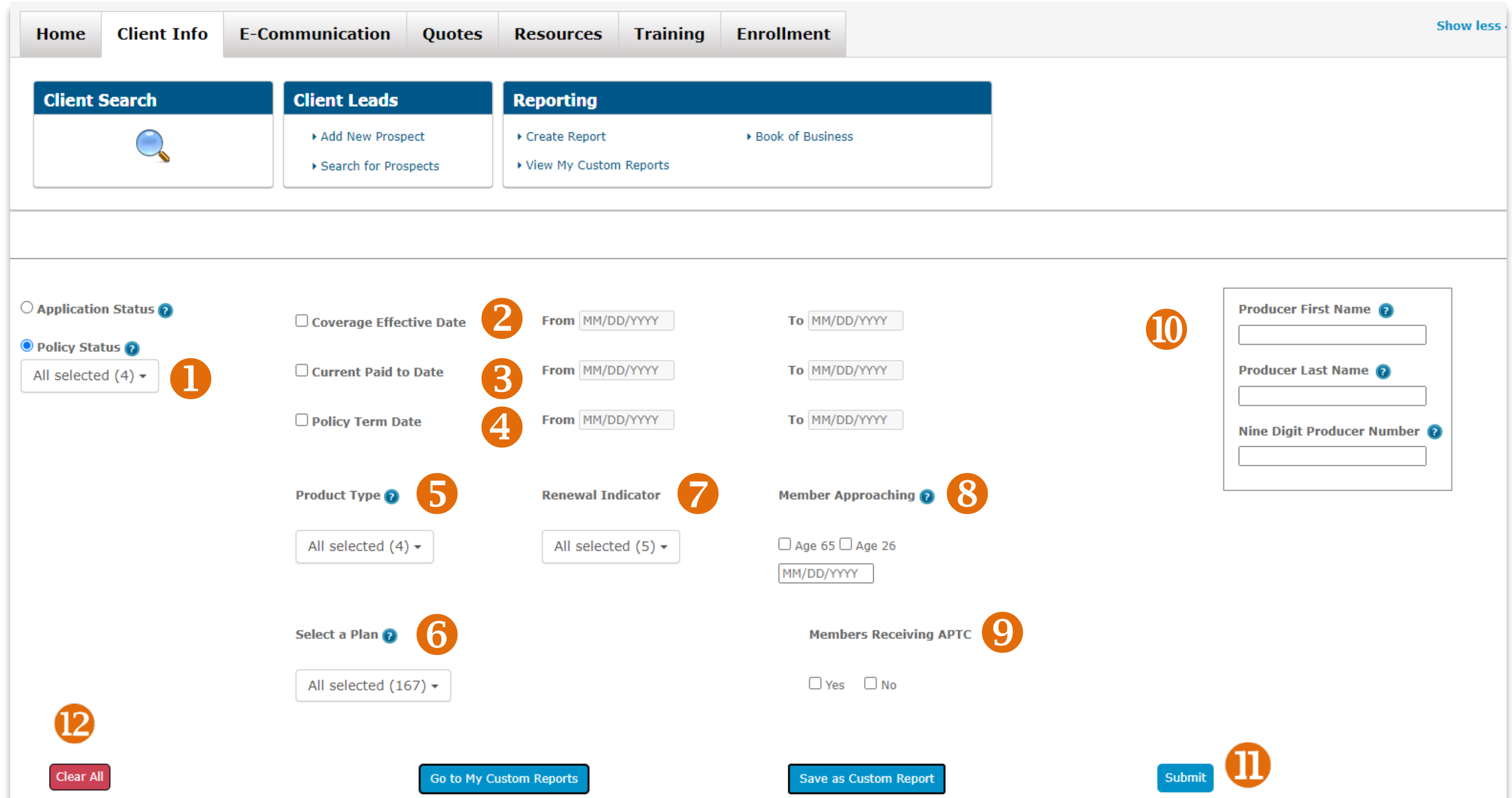


- All Selected – includes all medical plans and all dental plans.
- Medical –- includes all medical plans (no dental plans).
- Dental – includes all dental plans (no medical plans).

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.

- 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 form 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

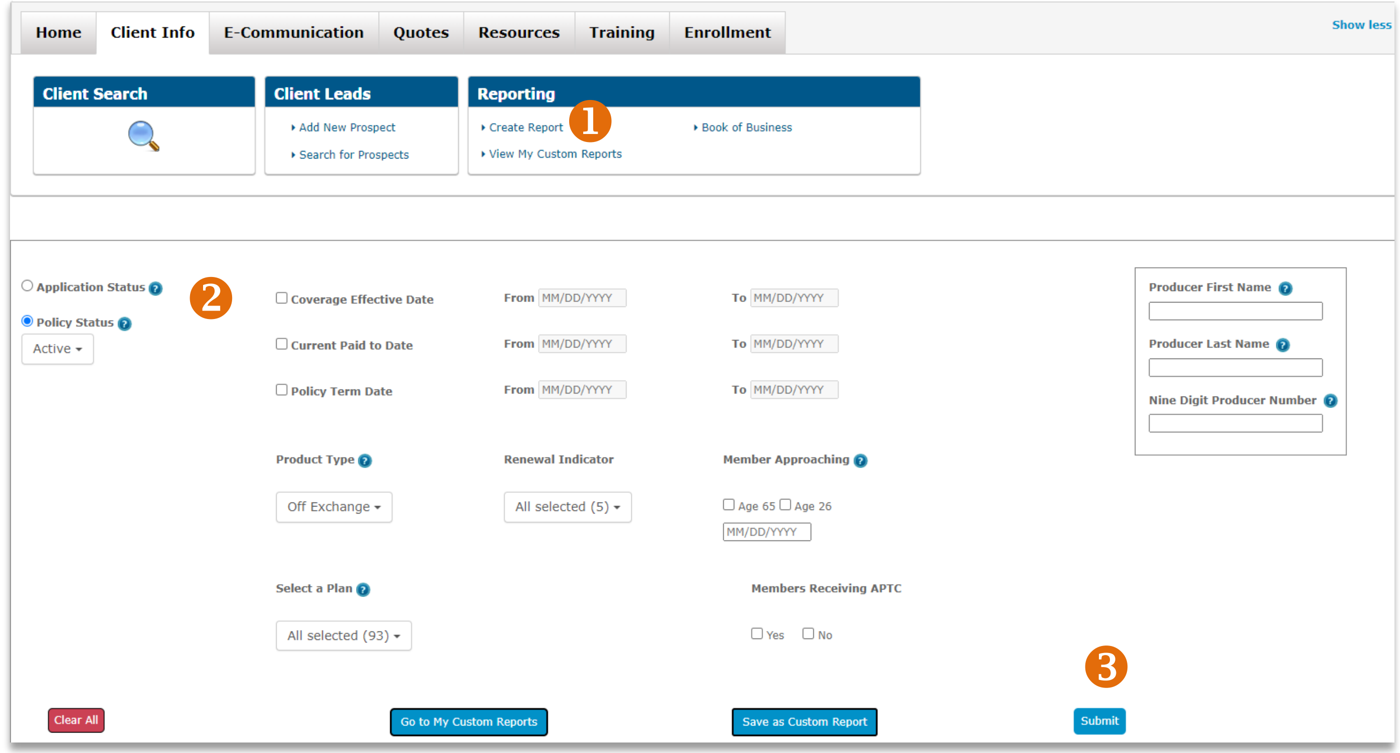
producer information prior to selecting the Application Status or Policy Status radio button, the fields will be automatically cleared, and you will have to re-enter the producer information again.)

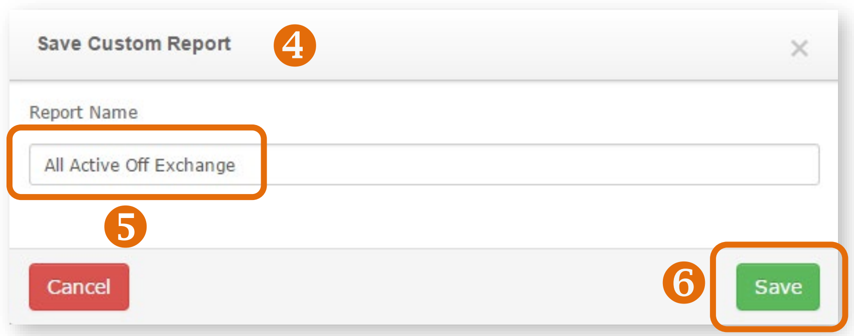
- Producer First Name
- Producer Last Name
- Nine Digit Producer Number

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.

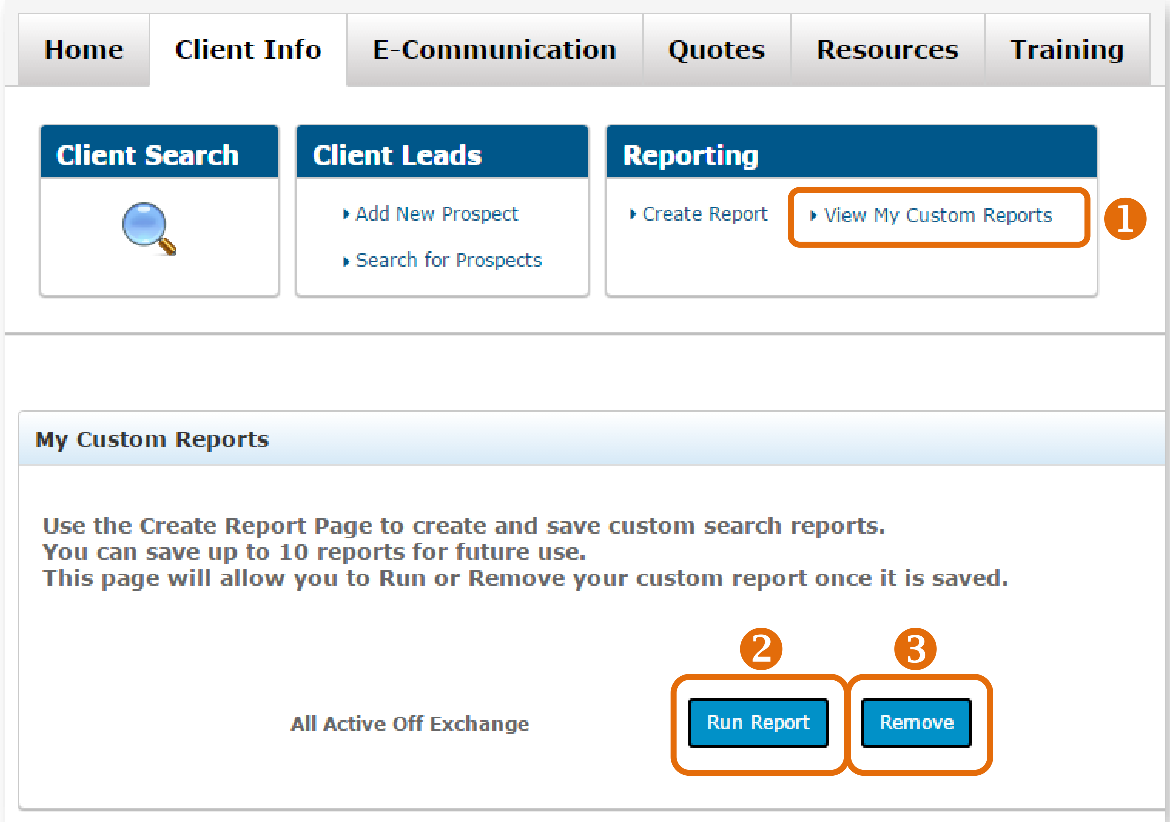




View Custom Reports

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

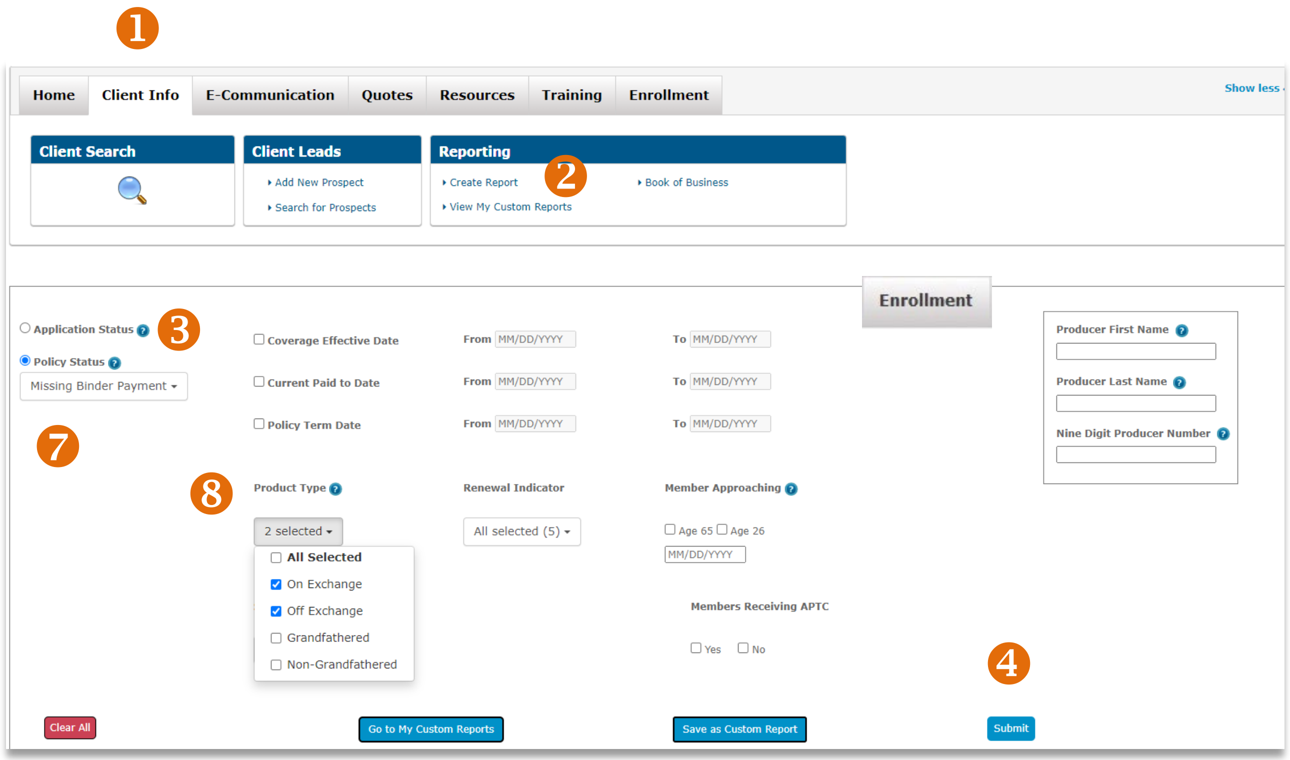
1. Select "View My Custom Reports" from the Reporting section of the Client Info tab.
2. Click on the "Run Report" button to see refreshed data.
3. If you've saved 10 reports and need to save another, one saved report will need to be deleted by clicking on the "Remove" button before a new report can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



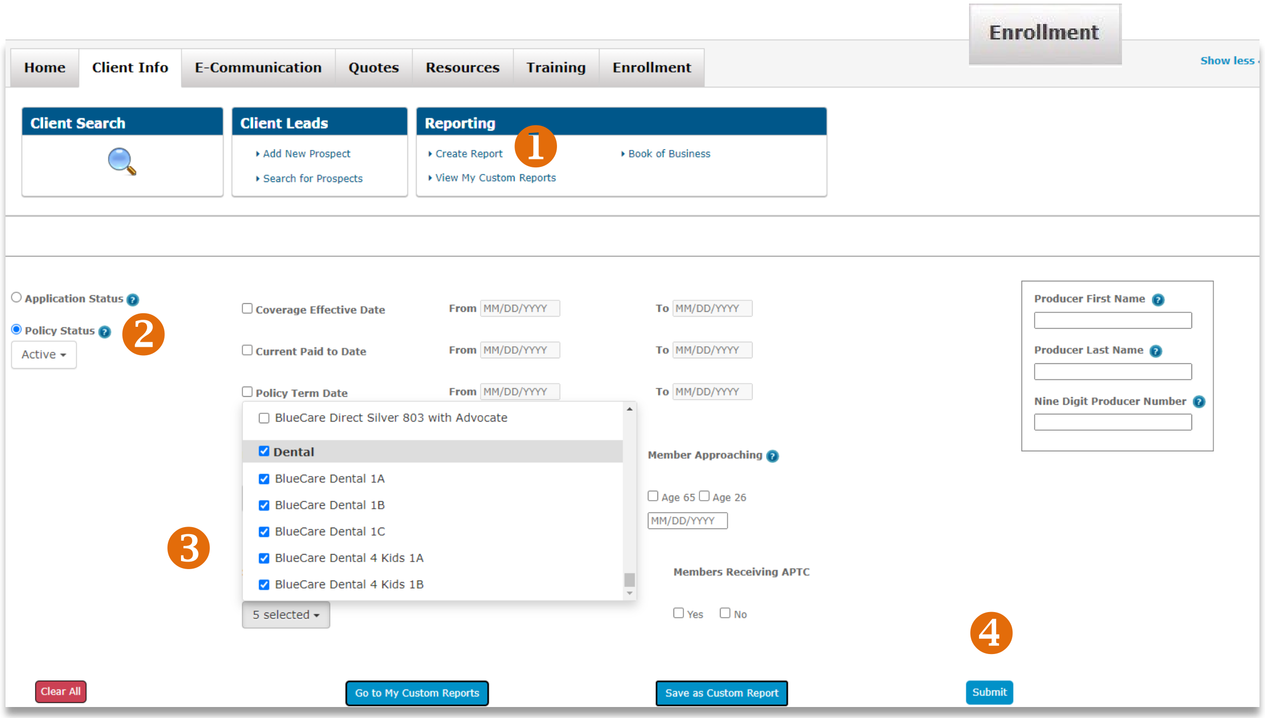
1. Go to the "Client Info" tab
2. Click on the "Create Report" link from the Reporting section.
3. Select "Application Status" and choose "Pending / In Progress" from the dropdown menu.
4. Click "Submit".
5. Then, export your data.
6. Repeat steps 1 and 2 above.
7. Select "Policy Status" and choose "Missing 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

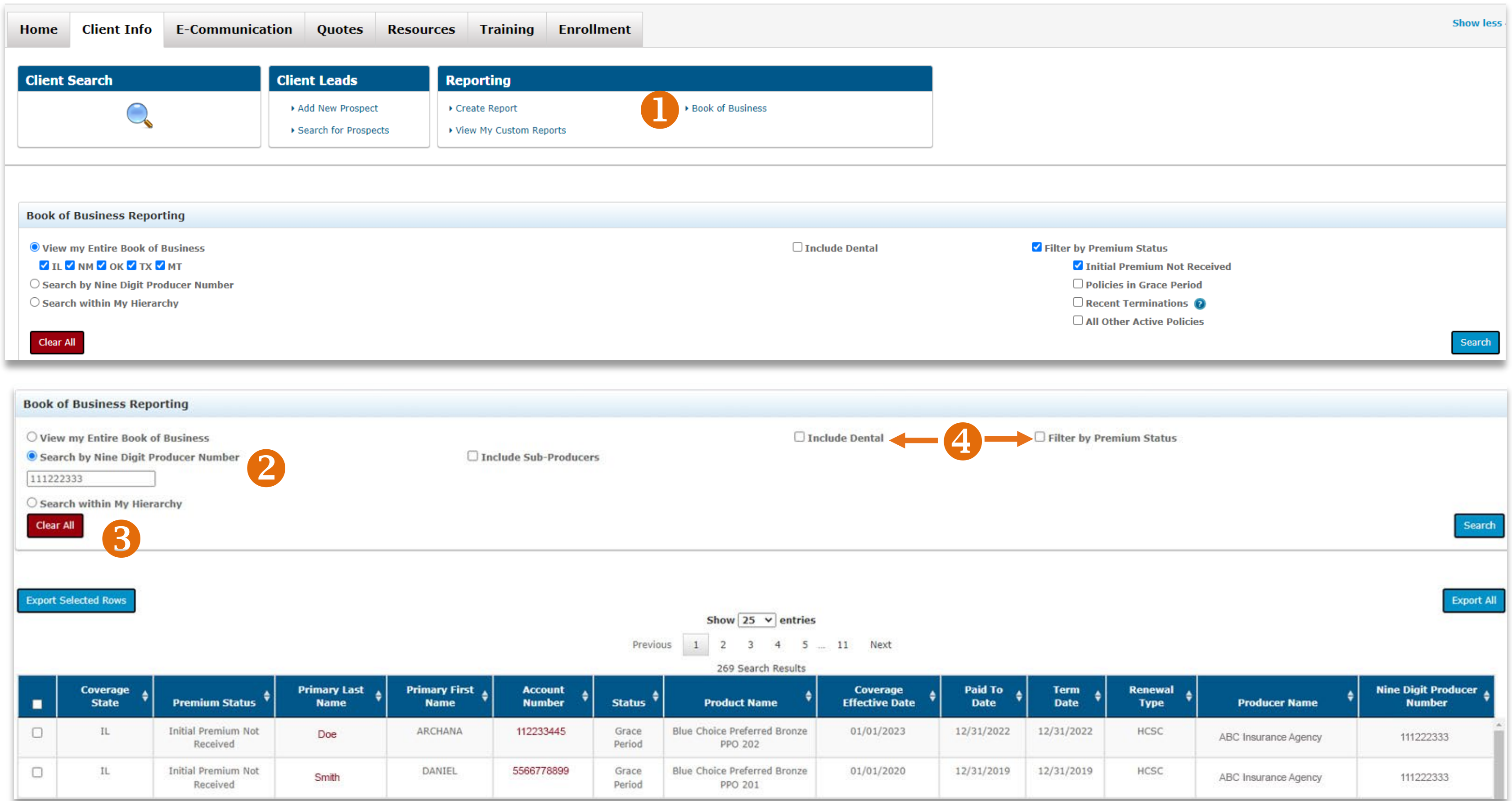
You can select as many or as few plan names as needed from the product name drop down list for a report.

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.

Using Book of Business Reports



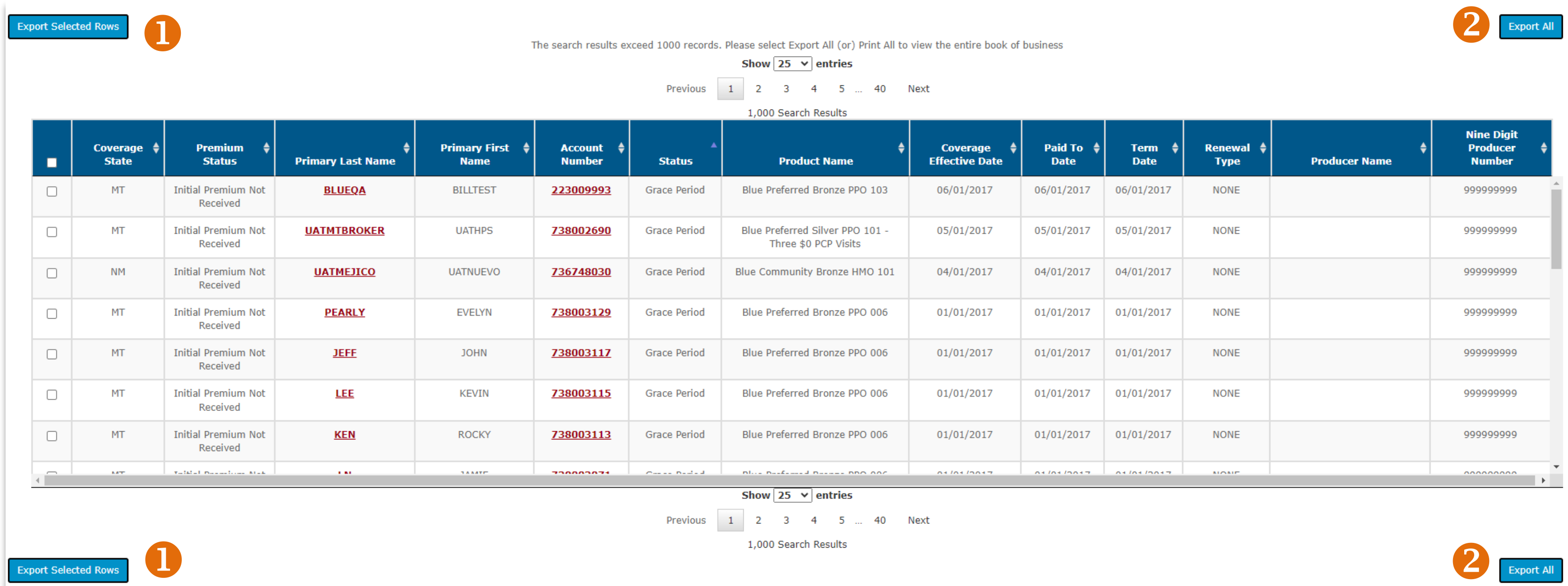
Book of Business reports are available to all General Agents and Agencies that have subproducers.

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.

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.