BlueCross BlueShield
Illinois • Montana • New Mexico • Oklahoma • Texas

Producer Experience Portal

Producer Experience Portal: IFM Standard Reporting User Guide

Purpose:

The Producer Experience Portal enables you to access information about your Book of Business from a centralized location. This experience supports viewing standardized reports, applying filters and sorting, and exporting report data to support day-to-day business needs. This section covers available reports, default criteria, and export functionality for Under 65 Individual and Family Markets (IFM) policies.

Table of Contents

[Table of Contents](#)

Reporting Tab

The Reporting section enables the user to:

- **Access Centralized Reporting**: View IFM policy and application reports from a single, standardized location
- **Apply Filters and Sort Data:** Narrow down and organize up to 1,000 records (on-screen) using available filtering and sorting tools
- **Run and Download Business Reports**: Run reports and export them to Excel, with flexible options so you can analyze sales trends, monitor the book of business, and identify opportunities

1. Click on Reporting tab***, two*** sections will appear:
    A. Reports – Run standard reports
    B. Book of Business – View, sort, and export your combined Book of Business

NOTE: *The system displays up to 1,000 records in the on-screen report view. Additional columns and all records exceeding this limit are included only in the exported Excel report.*

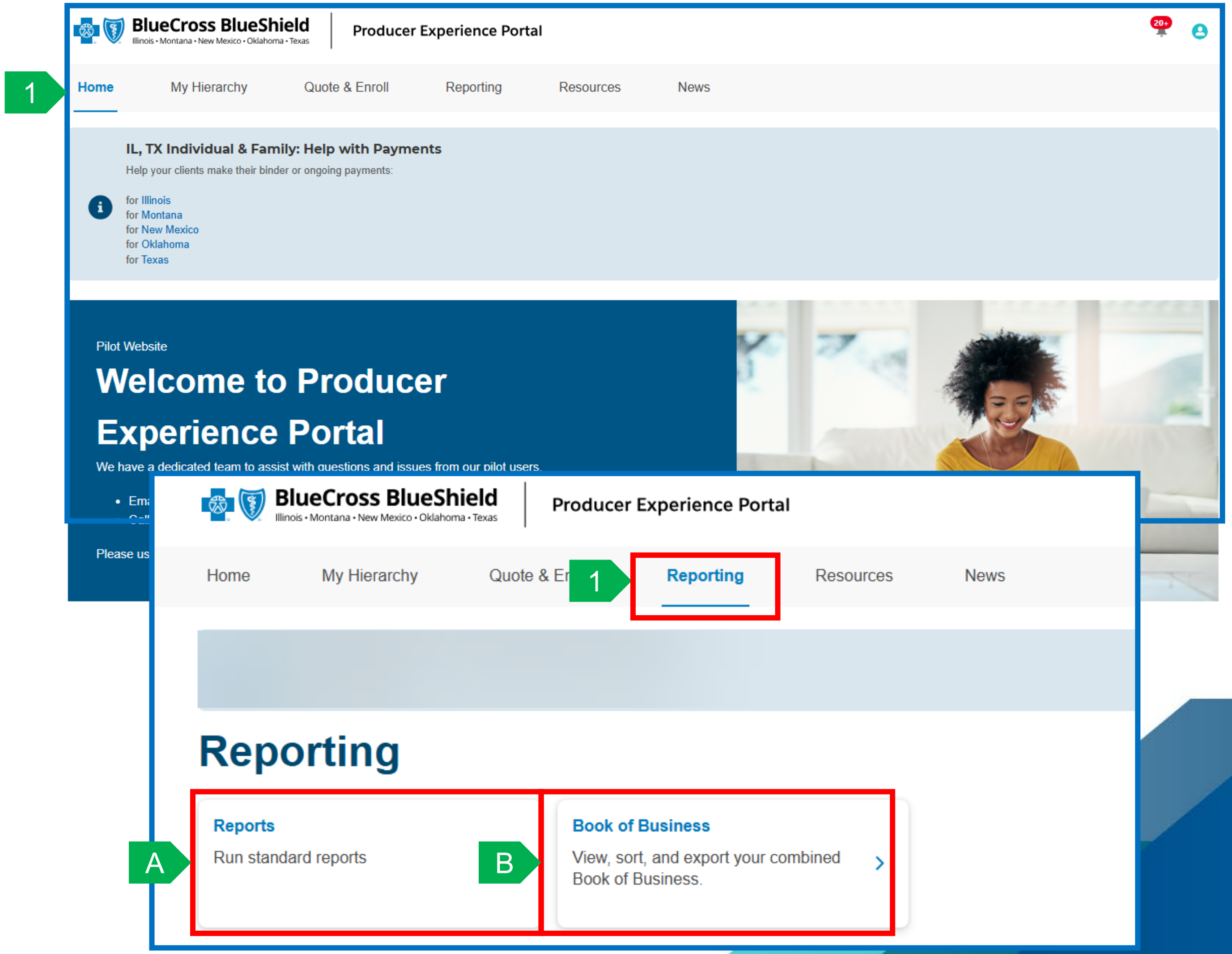
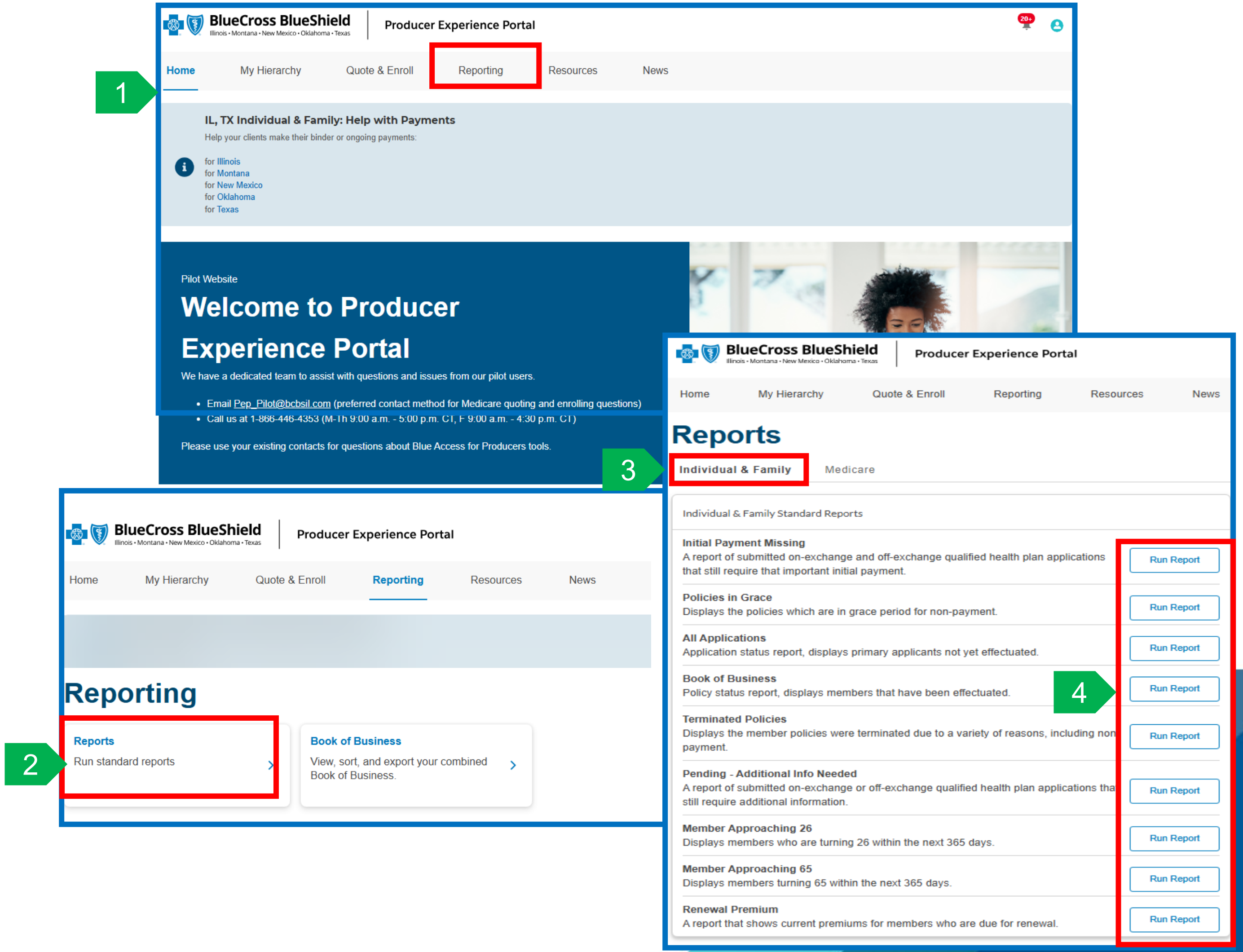


Table of Contents

View, Sort, and Filter Reports

1. To access **Reports**, navigate to the **Reporting** tab
2. Select **Reports**
3. Select **Individual & Family** tab to view IFM standard report types (There are 9 report types):
    - **Initial Payment Missing*:*** A report of submitted on-exchange and off-exchange qualified health plan applications that still require that important initial payment.
    - **Policies in Grace:** Displays the policies which are in grace period for non-payment.
    - **All Applications:** Application status report, displays primary applicants not yet effectuated.
    - **Book of Business:** Policy status report, displays members that have been effectuated.
    - **Terminated Policies:** Displays the member policies were terminated due to a variety of reasons, including non-payment.
    - **Pending- Additional Info Needed:** A report of submitted on-exchange or off-exchange qualified health plan applications that still require additional information.
    - **Member Approaching 26:** Displays members who are turning 26 within the next 365 days.
    - **Member Approaching 65:** Displays members turning 65 within the next 365 days.
    - **Renewal Premium:** A report that shows current premiums for members who are due for renewal.

4. Choose the report you need and select **Run Report**



View, Sort, and Filter Reports

5. You will be redirected to the results page where you can review the report fields.

5A. **To filter the data**, locate the search boxes under each column header and enter text in the column's search box.

5B. The report will automatically filter to display matching results based on the user's search criteria. ***Example: if "Lucas" is entered in the First Name field, the report displays all records associated with Lucas***

NOTE: *Multiple columns can be filtered simultaneously to refine the search.*

6. **To sort the data**, click on any column header to sort by the column**.** An upward arrow indicates ascending order (A to Z, 0 to 9, oldest to newest) and a downward arrow indicates descending order (Z to A, 9 to 0, newest to oldest).

NOTE: *The system displays up to 1,000 records in the on-screen report view. You can navigate within the report by clicking on the page numbers listed at the bottom of the screen.*

Additional columns and all records exceeding this limit are only included in the exported Excel report.

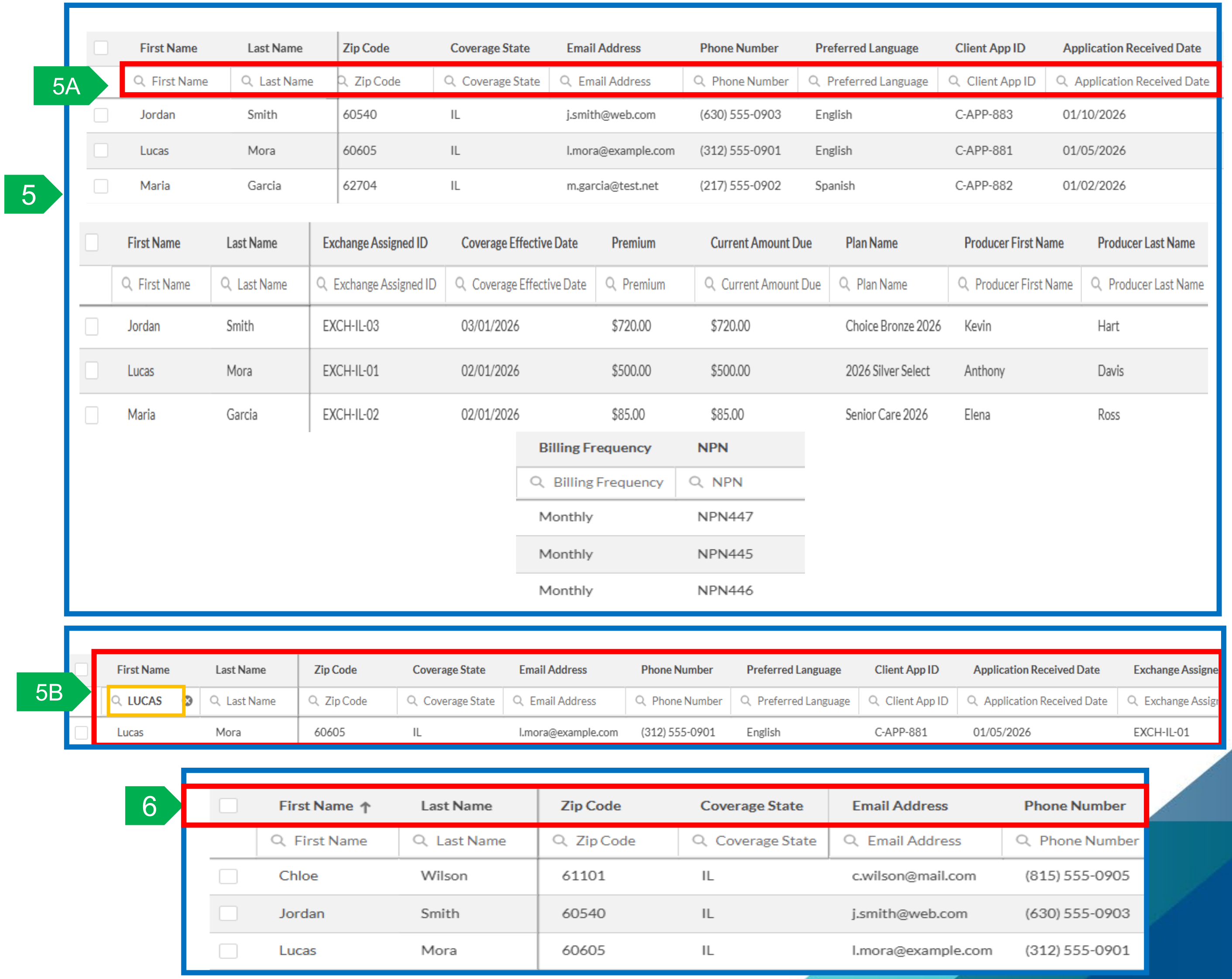


Table of Contents

Export Reports

7. You can **export the reports** in two different ways:

7A. **Export All**: By clicking on export all, user will download all records (unlimited rows) in Excel format, including all available columns

7B. **Export Selected Rows**: By clicking on export selected rows, user will download only the rows that have been checked or selected

8. Once the export is complete**, a download notification** will appear on the top right corner of the browser. Click on the downloaded file and open it.

9. The file will be opened in an **Excel format**, displaying all columns and complete report. You can then save this file to the desired location on your computer.