BlueCross BlueShield
Illinois • Montana • New Mexico
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Retail Producer Portal
STEP-BY-STEP

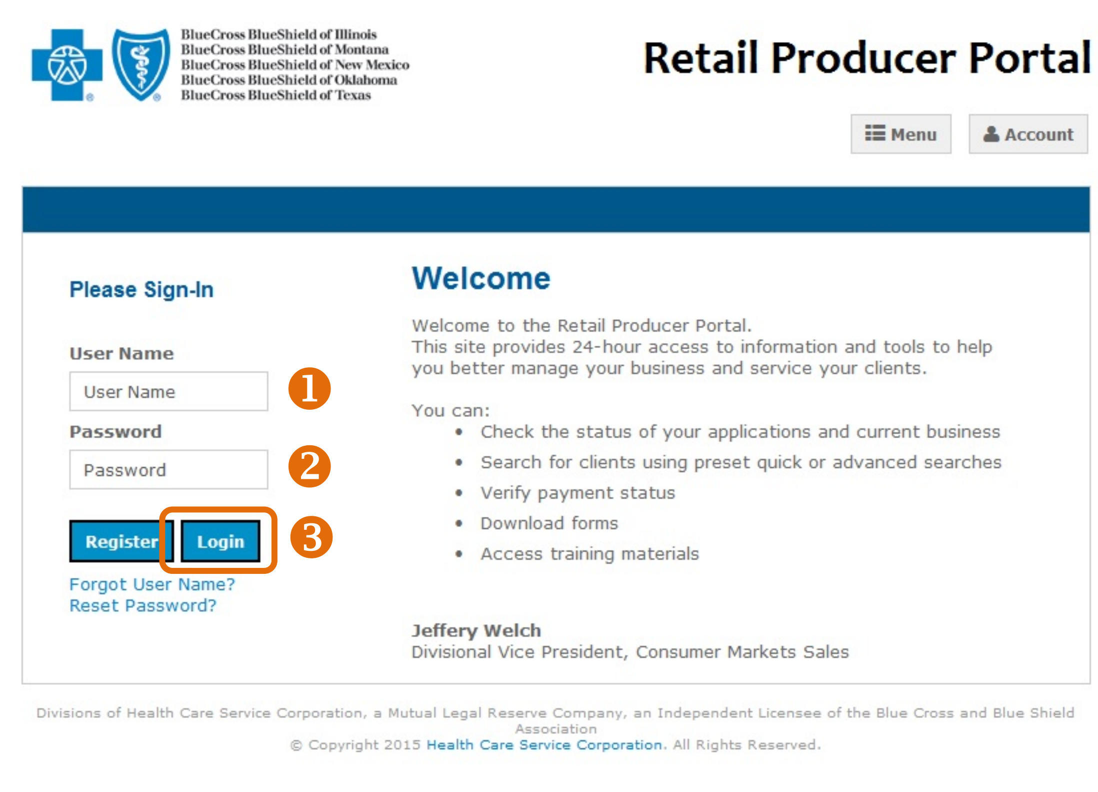
1 2 3 4 5 6

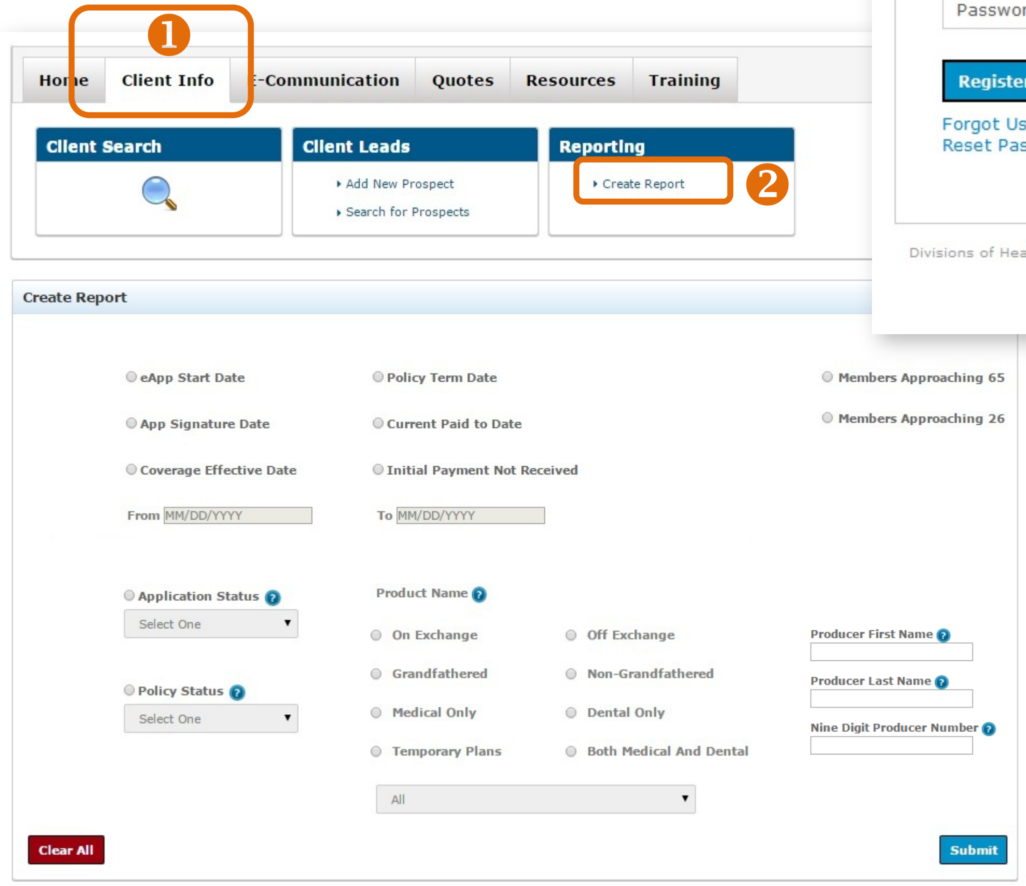
Finding Grace Period or Recently Terminated Members

The Retail Producer Portal has many status reporting functions. You can run reports to see the application, policy and even premium payment status of your clients. These reports can help you identify clients who may need additional support.

Log In to the Portal

1. Enter the User Name you created during the registration process.
2. Enter the Password you created during the registration process.
3. Click the "Login" button.





Select the Reporting Function

1. Click on the "Client Info" tab.
2. Select the "Create Report" link in the Reporting section.

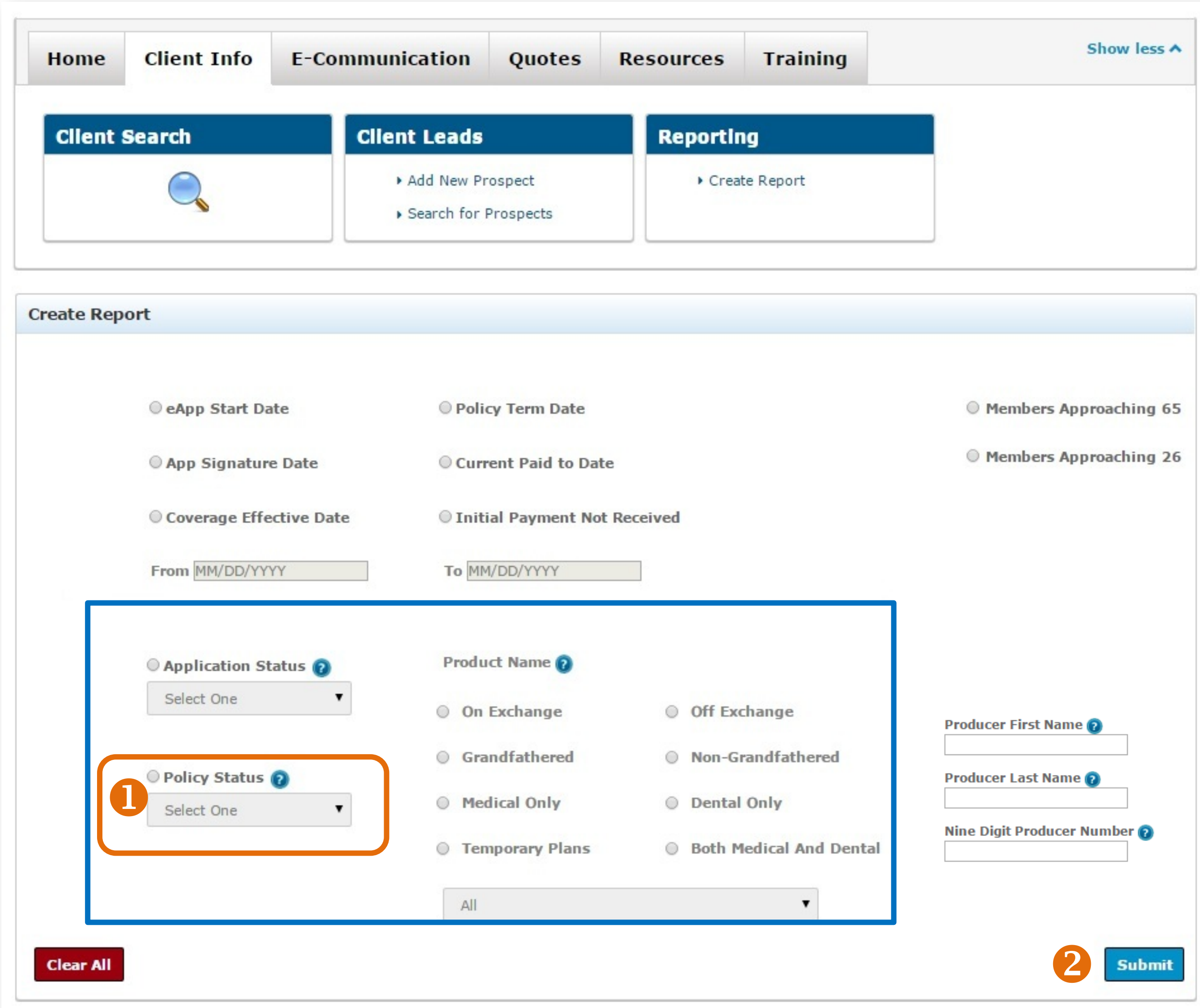
Find Grace Period Members

To find members who are in the grace period, follow these steps:

1. Select the "Policy Status" radio button and select one of the following from its dropdown menu:
   - All
   - Grace Period
   - Termed
   - Active

   If you select "All," all members with policies will display. The report includes a column showing "Grace Period," "Termed" or "Active" for each member.

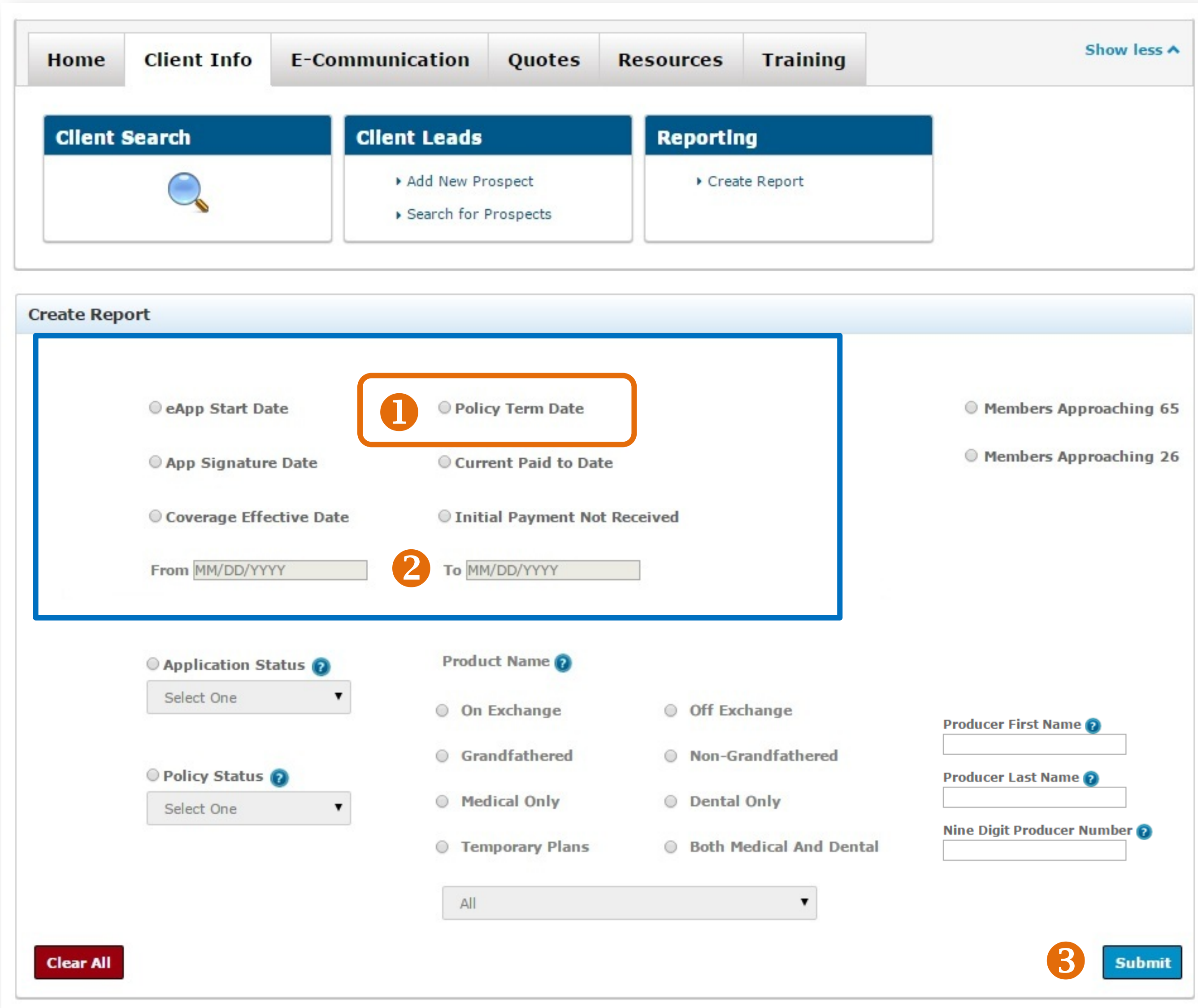
   If you select "Grace Period," only those in the grace period will display.
2. Click the "Submit" button to pull the report.



Find Terminated Policies

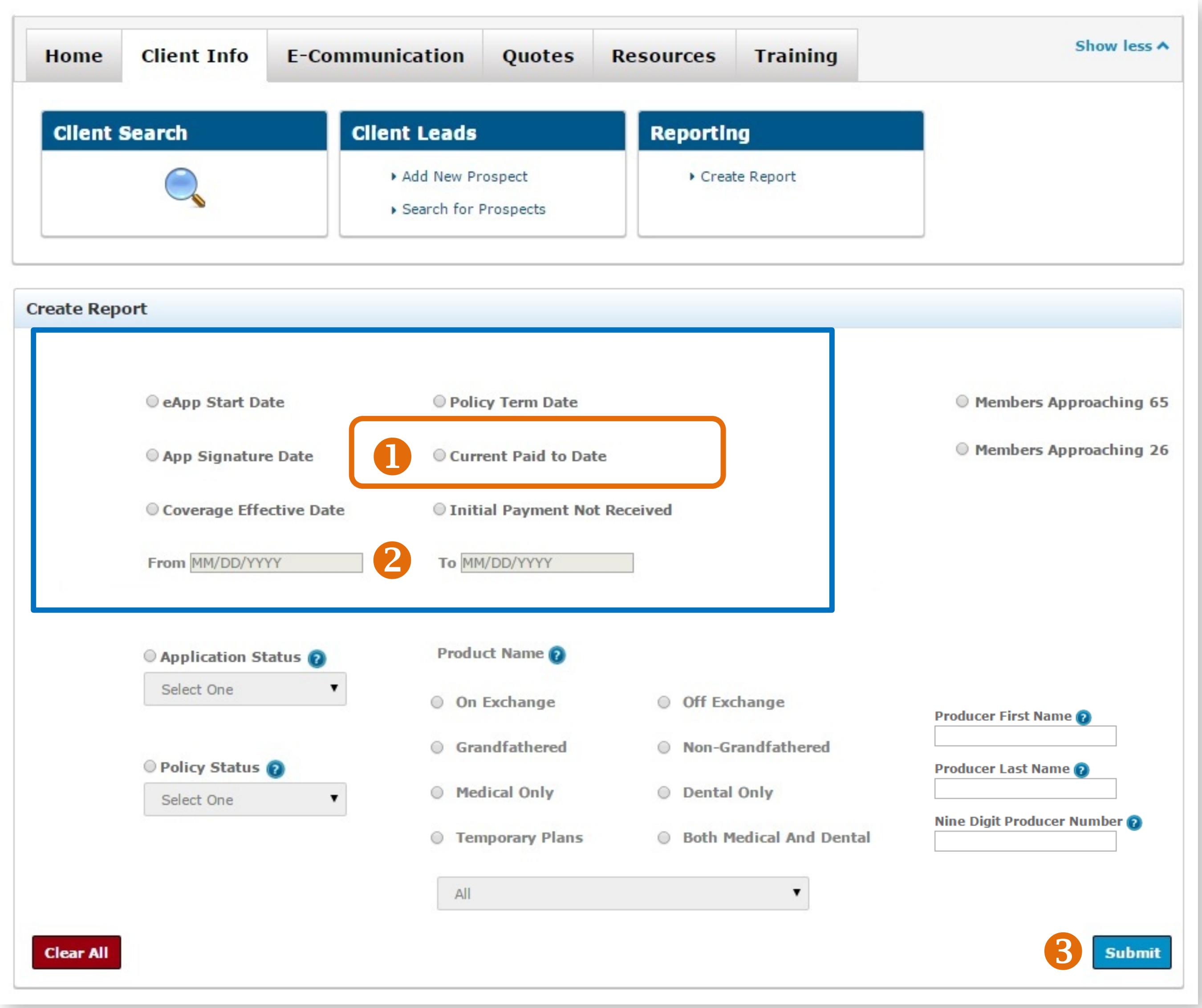
To find members who have recently been terminated so that you can contact them and help them get reinstated, follow these steps.

1. Select the **Policy Term Date** report. It will display all of the members whose policies were terminated and the termination dates.
2. Enter a "From date" and "To date."
3. Click the "Submit" button to pull the report using the report parameters you selected.



Find "Current Paid To Date" Members

1. Select the **Current Paid to Date** report. It will display the "paid to" dates of member policies.
2. Enter a "From date" and "To date."
3. Click the "Submit" button to pull the report using the report parameters you selected.



Find Members Who Haven't Paid Initial Premiums

1. Select the **Initial Payment Not Received** report. It will display the members who have not paid their initial premium payment.
2. Enter a "From date" and "To date."
3. Click the "Submit" button to pull the report using the report parameters you selected.