



**BlueCross. BlueShield.**

Illinois • Montana • New Mexico  
Oklahoma • Texas

# Retail Producer Portal STEP-BY-STEP



## 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.

Blue Cross and Blue Shield of Illinois, Blue Cross and Blue Shield of Montana, Blue Cross and Blue Shield of New Mexico,  
Blue Cross and Blue Shield of Oklahoma, and Blue Cross and Blue Shield of Texas,  
Divisions of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association

# 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.

The screenshot shows the 'Retail Producer Portal' interface. The navigation menu includes 'Home', 'Client Info', 'Communication', 'Quotes', 'Resources', and 'Training'. The 'Client Info' tab is selected and highlighted with a red box and a '1'. Below the navigation menu, there are three main sections: 'Client Search', 'Client Leads', and 'Reporting'. The 'Reporting' section contains a 'Create Report' link, which is highlighted with a red box and a '2'. Below these sections is a 'Create Report' form with various input fields and buttons.

**Create Report**

eApp Start Date       Policy Term Date       Members Approaching 65  
 App Signature Date       Current Paid to Date       Members Approaching 26  
 Coverage Effective Date       Initial Payment Not Received

From  To

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

Producer First Name ?

Producer Last Name ?

Nine Digit Producer Number ?

    

The screenshot shows the 'Retail Producer Portal' login page. The page features the BlueCross BlueShield logo and the text 'BlueCross BlueShield of Illinois, BlueCross BlueShield of Montana, BlueCross BlueShield of New Mexico, BlueCross BlueShield of Oklahoma, BlueCross BlueShield of Texas'. The page title is 'Retail Producer Portal'. There are 'Menu' and 'Account' buttons in the top right corner. The main content area is divided into two columns. The left column is titled 'Please Sign-In' and contains a 'User Name' field (1), a 'Password' field (2), a 'Register' button, and a 'Login' button (3). Below the 'Login' button are links for 'Forgot User Name?' and 'Reset Password?'. The right column is titled 'Welcome' and contains a welcome message, a list of features, and the name 'Jeffery Welch, Divisional Vice President, Consumer Markets Sales'. At the bottom of the page, there is a copyright notice: 'Divisions of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association. © Copyright 2015 Health Care Service Corporation. All Rights Reserved.'

**Retail Producer Portal**

Menu Account

**Please Sign-In**

User Name  1

Password  2

3

[Forgot User Name?](#)  
[Reset Password?](#)

**Welcome**

Welcome to the Retail Producer Portal.  
This site provides 24-hour access to information and tools to help you better manage your business and service your clients.

You can:

- Check the status of your applications and current business
- Search for clients using preset quick or advanced searches
- Verify payment status
- Download forms
- Access training materials

**Jeffery Welch**  
Divisional Vice President, Consumer Markets Sales

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## 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.

Home Client Info E-Communication Quotes Resources Training Show less ^

Client Search Client Leads Reporting

Client Leads: Add New Prospect, Search for Prospects

Reporting: Create Report

Create Report

eApp Start Date  Policy Term Date  Members Approaching 65

App Signature Date  Current Paid to Date  Members Approaching 26

Coverage Effective Date  Initial Payment Not Received

From MM/DD/YYYY To MM/DD/YYYY

Application Status  Product Name

Select One

On Exchange  Off Exchange

Grandfathered  Non-Grandfathered

Medical Only  Dental Only

Temporary Plans  Both Medical And Dental

Producer First Name

Producer Last Name

Nine Digit Producer Number

Clear All Submit

# 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.

The screenshot shows a web application interface with a navigation menu at the top: Home, Client Info, E-Communication, Quotes, Resources, Training, and Show less ^.

Below the navigation menu 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 a link for Create Report).

The 'Create Report' section is highlighted with a blue border and contains the following options:

- eApp Start Date
- App Signature Date
- Coverage Effective Date
- Policy Term Date (marked with a '1')
- Current Paid to Date
- Initial Payment Not Received
- Members Approaching 65
- Members Approaching 26

Below these options are two date input fields: From  (marked with a '2') and To  (marked with a '2').

Further down are several filter options:

- Application Status
- Policy Status
- Product Name
- On Exchange
- Grandfathered
- Medical Only
- Temporary Plans
- Off Exchange
- Non-Grandfathered
- Dental Only
- Both Medical And Dental
- Producer First Name
- Producer Last Name
- Nine Digit Producer Number

At the bottom left is a 'Clear All' button, and at the bottom right is a 'Submit' button (marked with a '3').

# 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.

Home Client Info E-Communication Quotes Resources Training [Show less ^](#)

**Client Search** **Client Leads** **Reporting**

▶ Add New Prospect  
▶ Search for Prospects  
▶ Create Report

**Create Report**

eApp Start Date  Policy Term Date  Members Approaching 65

App Signature Date **1**  **Current Paid to Date**  Members Approaching 26

Coverage Effective Date  Initial Payment Not Received

From  **2** To

Application Status  **Product Name**  On Exchange  Off Exchange

Policy Status   Grandfathered  Non-Grandfathered

Medical Only  Dental Only

Temporary Plans  Both Medical And Dental

**3**

# 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.

The screenshot shows a web application interface for creating a report. The navigation menu includes Home, Client Info, E-Communication, Quotes, Resources, and Training. The main content area has three tabs: Client Search, Client Leads, and Reporting. The Reporting tab is active, showing a 'Create Report' form. The form includes several filters and a 'Submit' button. A blue box highlights the 'Initial Payment Not Received' radio button and the 'From' and 'To' date fields. A red box highlights the 'Submit' button.

Home Client Info E-Communication Quotes Resources Training Show less ^

Client Search Client Leads Reporting

Add New Prospect Search for Prospects Create Report

Create Report

eApp Start Date  Policy Term Date  Members Approaching 65

App Signature Date  Current Paid to Date  Members Approaching 26

Coverage Effective Date **1**  Initial Payment Not Received

From MM/DD/YYYY **2** To MM/DD/YYYY

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

Producer First Name ?

Producer Last Name ?

Nine Digit Producer Number ?

All

Clear All **3** Submit