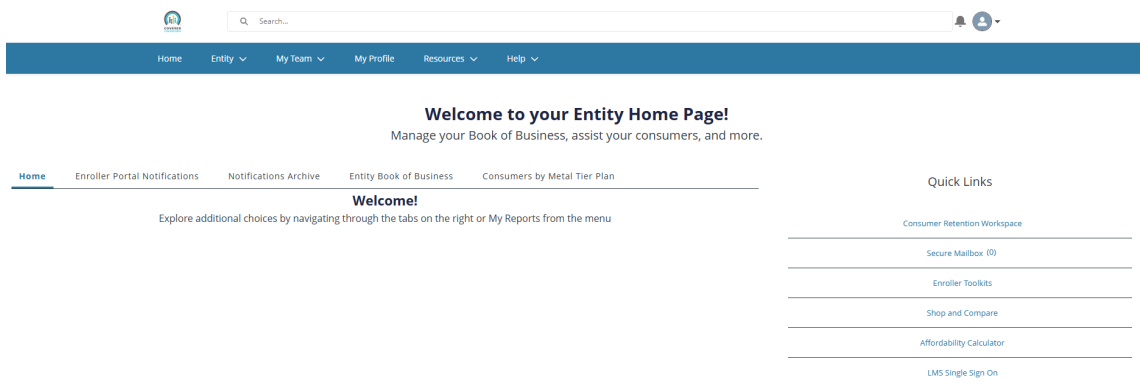


AI/AN Plan Name Guide: Report Building in Enroller Portal

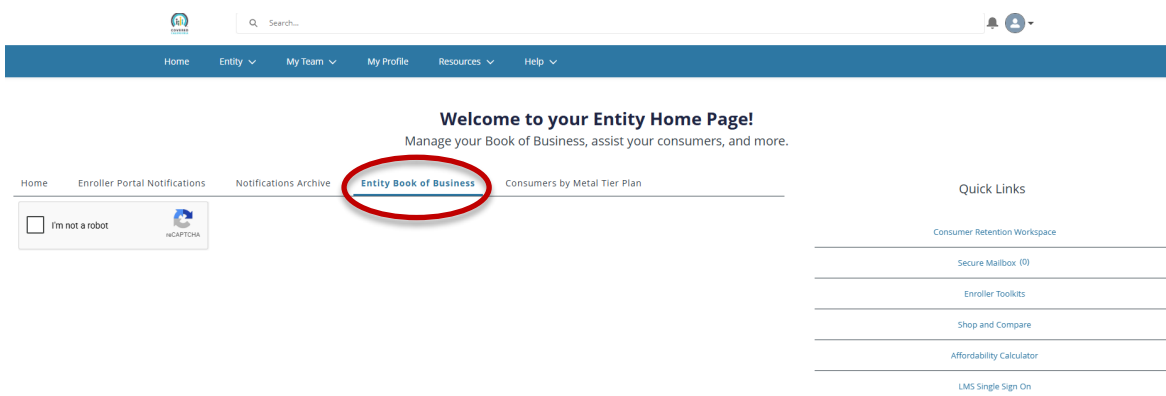
To access the listing of delegated consumers enrolled in an AI/AN Plan, follow these steps. The following process describes a report that can be generated at any time and will result in a downloaded file that can be further filtered as needed to only show specific carriers. If you have any questions, please reach out to CommunityPartners@covered.ca.gov.

Report Steps

1. Log into Enroller Portal as the Entity Admin user.



2. Select Entity Book of Business



3. After completing the Captcha, select Edit

Enroller Portal Notifications Notifications Archive **Entity Book of Business** Consumers by Metal Tier Plan

Contact Application and Enrollees
Book of Business by Enroller Contact

Search Add Chart Filter Refresh **Edit** ▼

CalHEERS Case ID ↑ Year of Application First Name Middle Name Last Name Customer DOB SSN Last 4 Residence Address Line 1

4. A Report Builder screen will load.

REPORT ▼
Book of Business by Enroller Contact / Contact Application and Enrollees

⏮ ⏭ ⏮ ⏭ Add Chart Save ▼ Close Run

Update Preview Automatically

Outline Filters 1

Groups

Enroller Contact CalHEERS Case ID ↑ Year of Application First Name Middle Name Last Name Customer DOB SSN Last 4 Residence Address Line 1 Residence Address Line 2 Address - City Address - State

5. On the left of the Report Builder are two tabs, Outline and Filters. Click Filters tab.

REPORT ▼
Book of Business by Enroller Contact

Outline Filters 1

Filters

Add Filter...

Show Me
All contact applications

Application: Created Date
All Time

Year of Application
equals 2024, 2025, 2026

6. Next to the magnifying glass icon, click in the grey box and type Plan Name in the Filter by Field, and select contains as the Operator, and type in AI-AN in the value box as shown in the screenshot.

All contact applications

Application: Created Date
All Time

Year of Application
equals 2024, 2025, 2026

Plan Name
contains ""

Filter By

Field
Plan Name

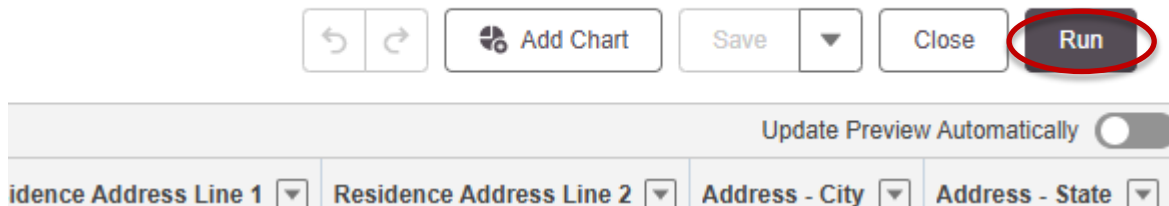
Operator
contains

Use relative value

AI-AN

☐ Locked Cancel Apply

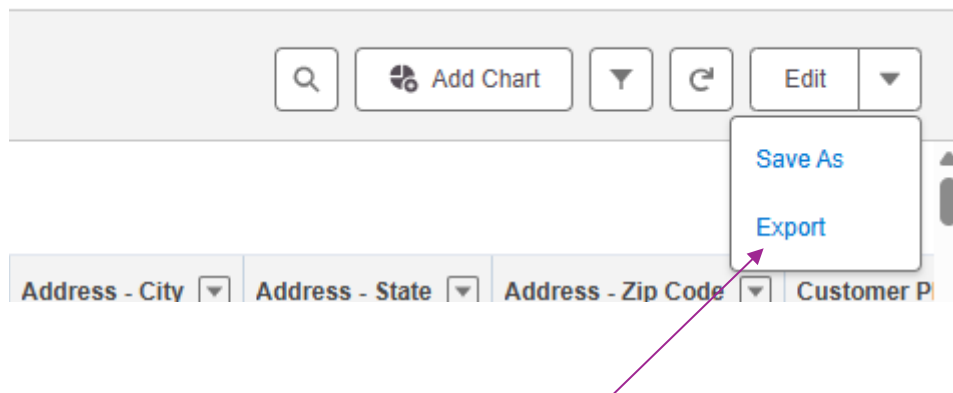
- Click the Run button on the far right of the screen.



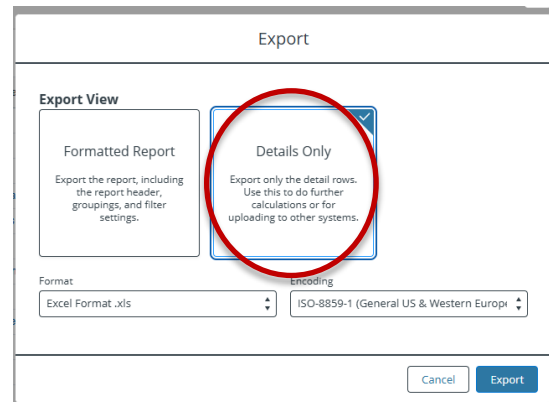
- Using the drop down button next to Edit on the right side of the screen, you will see Save As and Export.

Depending on your role, you may be able to save this report view to make this process faster next time. Use Save As and type a report name that will make it easy to find next time.

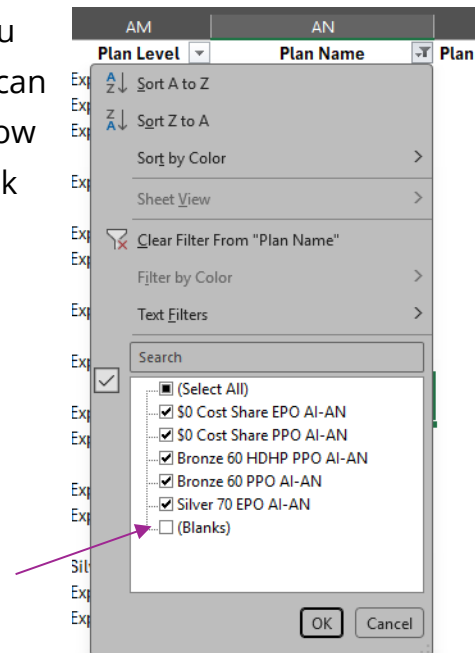
To download the file of the AI/AN plan consumers, select Export.



9. Select details only, this generates a simple .csv data sheet consisting of one tab, with each column able to be filtered. Save to your local drive as needed.



10. Scroll to the right, the data set is wide and you will see Plan Name as a column header, that can be filtered as shown by clicking the down arrow on the right side of the cell. Unselect the blank value if present. Click Ok.



11. This will show only consumers enrolled in an AI/AN Plan.

Using the same process to filter, find the Carrier Name column and the sheet will only display the consumers in an AI/AN plan with the selected carrier(s).

AN	
Plan Name	Plan Eff
12e \$0 Cost Share PPO AI-AN	
12e \$0 Cost Share PPO AI-AN	
12e Bronze 60 PPO AI-AN	
12e \$0 Cost Share PPO AI-AN	
12e \$0 Cost Share PPO AI-AN	
12e \$0 Cost Share EPO AI-AN	
12e \$0 Cost Share EPO AI-AN	
12e \$0 Cost Share EPO AI-AN	
12e \$0 Cost Share PPO AI-AN	
12e Bronze 60 HDHP PPO AI-AN	
12e Bronze 60 PPO AI-AN	
12e \$0 Cost Share PPO AI-AN	
Silver 70 EPO AI-AN	
12e \$0 Cost Share PPO AI-AN	
12e \$0 Cost Share PPO AI-AN	