



Enroller Portal My Reports Task Guide

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Overview

This Quick Guide contains steps to access the Agency or Entity Book of Business and the My Book of Business for Agency and Entity users.

Depending on your role in the Agency or Entity, you will be able to access one or both the Agency/Entity Book of Business and My Book of Business (your own Book of Business).

Agency User Role Access

The following roles have access to **both** the Agency Book of Business as well My Book of Business:

- Agency Managers (AM1 and AM2)
- Agents (A2)

The following roles have access to only the Agency Book of Business:

- Authorized Signer (AS), Approved Admin Staff Level 1 (AAS1), and Approved Admin Staff Level 2 (AAS2)

An Agent Level 1 (A1) has access to **only** My Book of business.

Entity User Role Access

The following roles have access to only Entity Book of Business:

- Primary Contact and Authorized Contact

Counselors only have access to Book of Business.



Enroller Portal My Reports Task Guide

Background

The Book of Business contains Covered California, Mixed Household, and Medi-Cal members. It provides Enrollers with a near real-time view on their active consumer delegations in CalHEERS. This data is refreshed nightly.

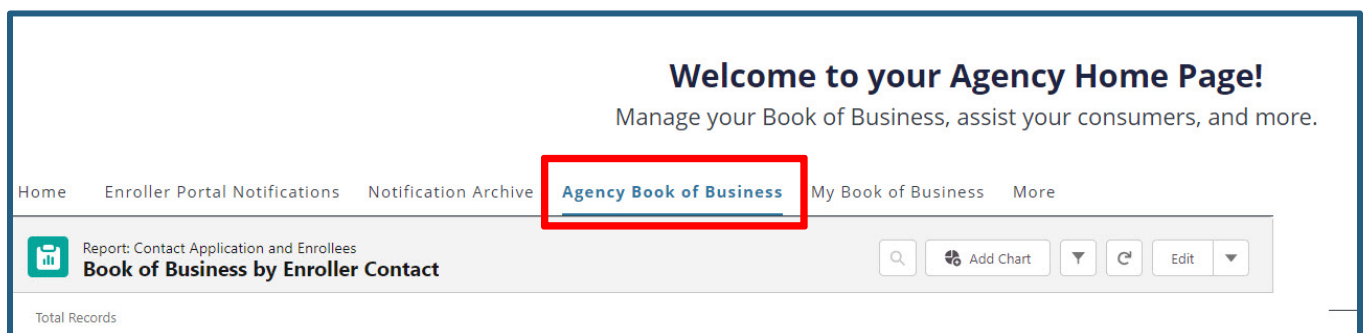
In its Excel document format, the Book of Business enables you to sort, manipulate, and maintain client data.

Note: To see a description of the fields found within the Book of Business, see the [Book of Business Description Chart](#). Note that if the information is not applicable or not provided, the data under that column will be blank.

Important: The Book of Business contains consumers' **Personally Identifiable Information (PII)** and must remain secure and confidential in accordance with Covered California's Security and Privacy policies as outlined in the Agent Agreement or Counselor Agreement, including all applicable laws and regulations. It is the Agent's responsibility to ensure that they handle this information in the appropriate manner. Remember that emails with consumer PII must be encrypted or secured.

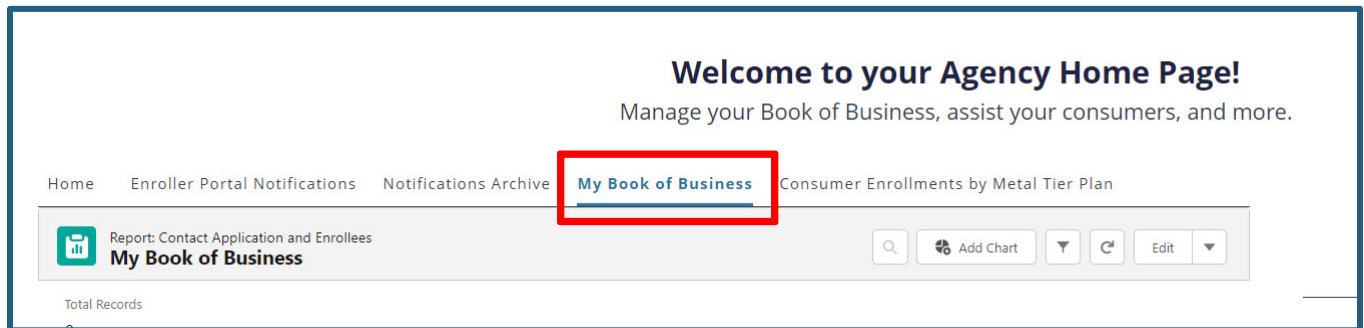
Book of Business Steps for Agency Users

1. Login to the Enroller Portal. Depending on your role, you will see tabs on the home page for the Agency Book of Business and/or your own Book of Business.
 - If you have access to the Agency Book of Business, the Agency Book of Business is displayed on the home page.



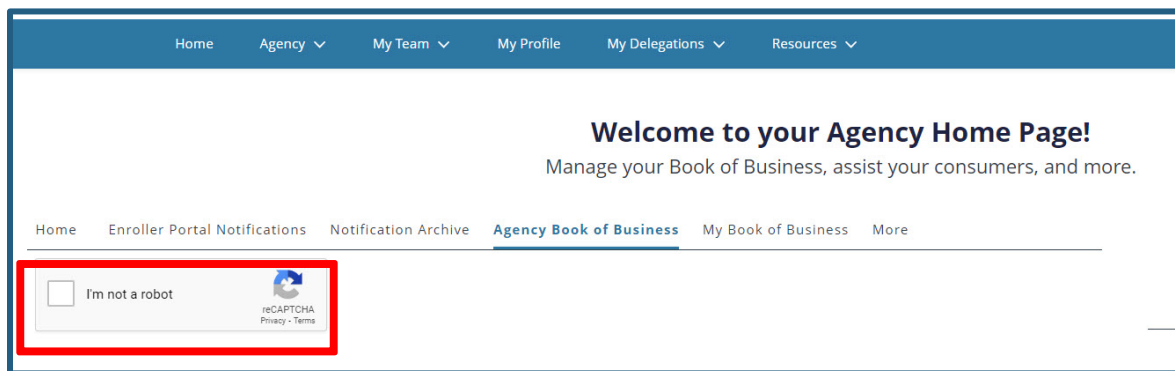
- And if you have access to **only** My Book of Business, your own Book of business is displayed on the home page.

Enroller Portal My Reports Task Guide

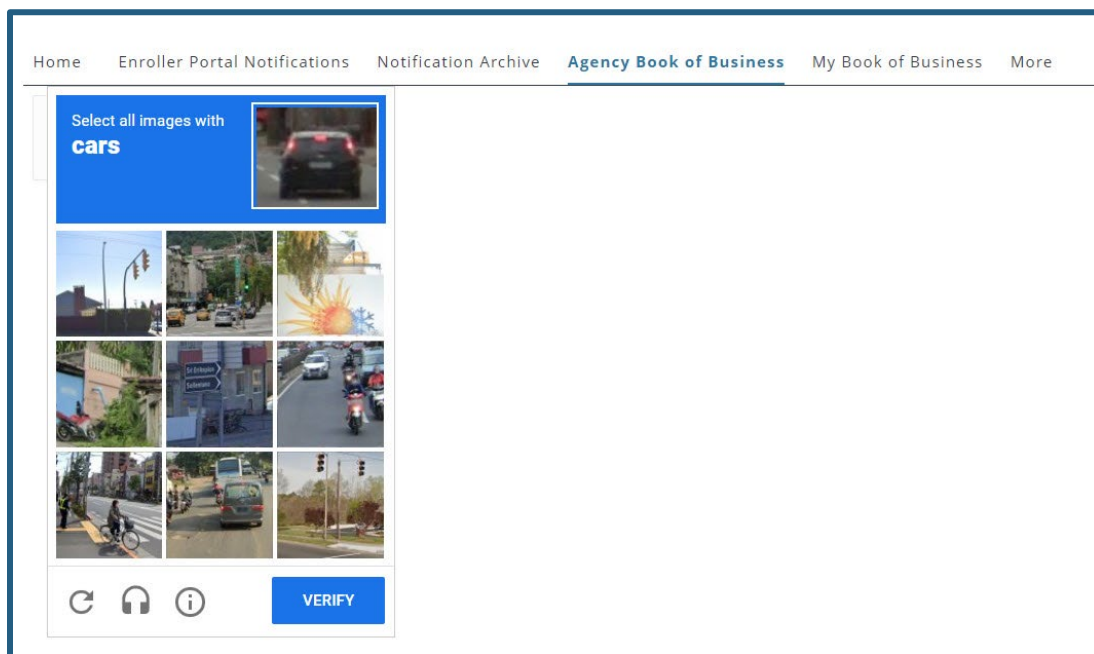


To view the **Book of Business**, reCAPTCHA is required.

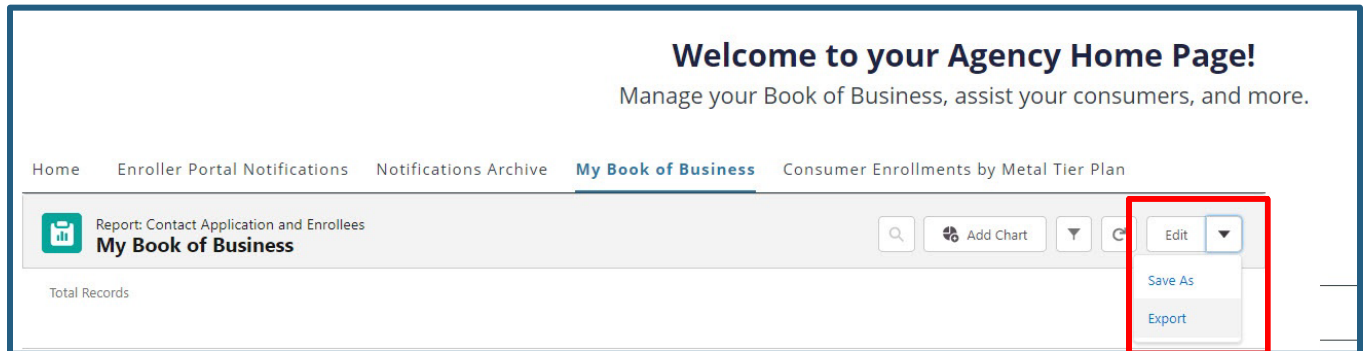
2. Select the checkbox for I am not a robot



3. Select the images provided in the instructions and click **Verify**



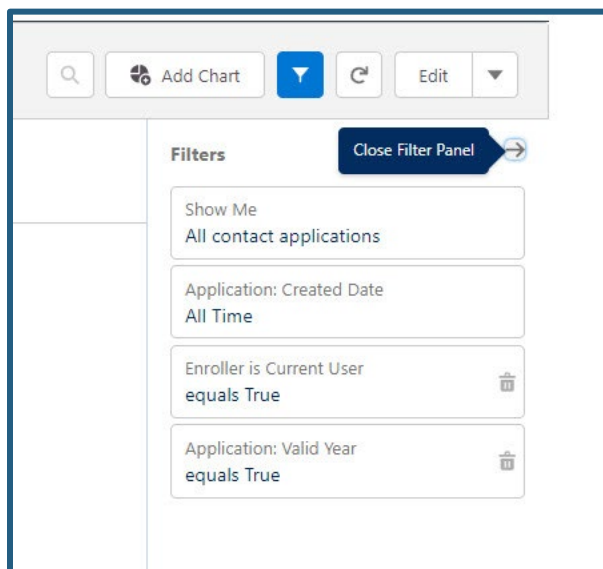
- Click the dropdown for **Edit**, and then select **Export**.



Note: Filters can be applied at this step to speed up the process of downloading the information you require from the Book of Business.

Click the filter icon in the top-right corner of the Book of Business / My Book of Business.

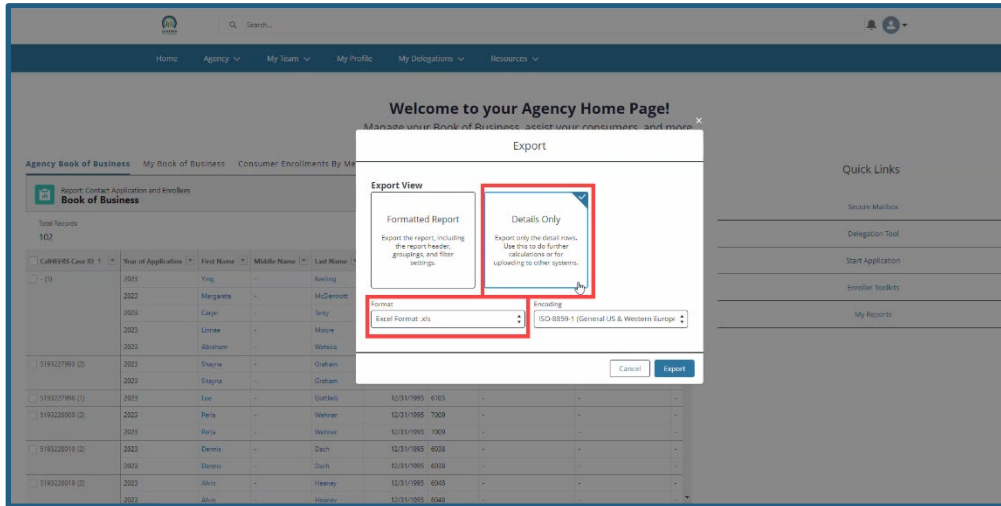
You can filter by contact applications, the date that the application was created, or the valid year.



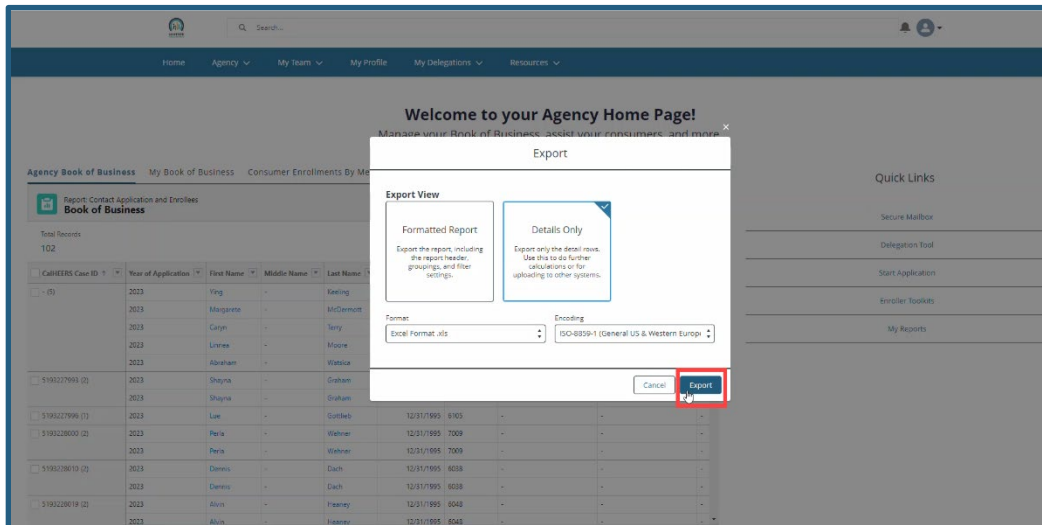
- Once you have applied the filter of your choice, click **Export** from the *Edit* dropdown.

For Agencies with a large book of business, the process to load/export may take longer than expected. During this time the user is still able to conduct other business while the export downloads.

- Select Details Only as the exported view (recommended) and confirm that the format selected is Excel.



- Click **Export**.



The Agency Book of Business / My Book of Business will export in an Excel file with the consumer data. You will be able to sort and view enrollment data, consumer data, Medi-Cal information, etc. for consumers.



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The exported Agency Book of Business will display all consumer data.

Year of Application	First Name	Middle Name	Last Name	Customer ID	SSN Last	Residence Address Line	Address - City	Address - State	Address - Zip Code	Customer Email	Customer Phone	CalHEERS Application	Application Status	Case Status
2023	Prince		Marcelus	12/31/1995								151702899	IN PROGRESS	
2023	Marcelus		Smith	12/31/1995								151702896	IN PROGRESS	
2023	Edmundo		Weber	12/31/1995								151703148	IN PROGRESS	
2023	Shanae		Mohr	12/31/1995								151703149	IN PROGRESS	
2023	Anabel		Walker	12/31/1995 5008						ralph.turner@gmail.com		151702820	SUBMITTED	ACTIVE
2023	Toshiko		Ritchie	8/15/2007 7000								151702823	SUBMITTED	ACTIVE
2023	Burns		Akundung	12/5/1975 5136						ralph.turner@gmail.com		151702823	SUBMITTED	ACTIVE
2023	Kovack		Kovack	12/31/1995 7100								151702828	SUBMITTED	ACTIVE
2023	Delphi		Powlowksi	12/5/1975 5002								151702830	SUBMITTED	ACTIVE
2023	Delphi		Powlowksi	12/5/1975 5002								151702830	SUBMITTED	ACTIVE
2023	Lousenia		Schamberger	8/15/2007 5003								151702830	SUBMITTED	ACTIVE
2023	Mercedes		Streich	12/31/1995 5037						ralph.turner@gmail.com		151702836	SUBMITTED	ACTIVE
2023	Mercedes		Streich	12/31/1995 5037						ralph.turner@gmail.com		151702836	SUBMITTED	ACTIVE
2023	Calvin		Hermiston	12/31/1995 5000						ralph.turner@gmail.com		151702842	SUBMITTED	ACTIVE
2023	Dong		Kassulke	12/31/1995 5004						ralph.turner@gmail.com		151702843	SUBMITTED	ACTIVE
2023	Antonio		Larson	12/31/1995 5002						ralph.turner@gmail.com		151702845	SUBMITTED	ACTIVE
2023	Antonio		Larson	12/31/1995 5002						ralph.turner@gmail.com		151702845	SUBMITTED	ACTIVE
2023	Leonia		Friesen	12/31/1995 5008						ralph.turner@gmail.com		151702847	SUBMITTED	ACTIVE
2023	Leonia		Friesen	12/31/1995 5008						ralph.turner@gmail.com		151702847	SUBMITTED	ACTIVE
2023	Elia		Lang	12/5/1975 5005						ralph.turner@gmail.com		151702851	SUBMITTED	ACTIVE
2023	Elia		Lang	12/5/1975 5005						ralph.turner@gmail.com		151702851	SUBMITTED	ACTIVE
2023	Mikel		Haag	8/15/2007 5006								151702851	SUBMITTED	ACTIVE
2023	Palmer		Russell	12/31/1995 5058						ralph.turner@gmail.com		151702853	SUBMITTED	ACTIVE
2023	Palmer		Russell	12/31/1995 5058						ralph.turner@gmail.com		151702853	SUBMITTED	ACTIVE
2023	Brice		Corney	12/31/1995 5062						ralph.turner@gmail.com		151702859	SUBMITTED	ACTIVE
2023	Brice		Corney	12/31/1995 5062						ralph.turner@gmail.com		151702859	SUBMITTED	ACTIVE
2023	Ronnie		Torphy	12/31/1995 5000						ralph.turner@gmail.com		151702867	SUBMITTED	ACTIVE
2023	Edgar		Feil	12/5/1975 5003								151702874	SUBMITTED	ACTIVE
2023	Edgar		Feil	12/5/1975 5003								151702874	SUBMITTED	ACTIVE
2023	Gutfowski		Gutfowski	8/15/2007 7004								151702874	SUBMITTED	ACTIVE
2023	Cinda		Bogisch	12/31/1995 7010						ralph.turner@gmail.com		151702875	SUBMITTED	ACTIVE
2023	Cinda		Bogisch	12/31/1995 7010						ralph.turner@gmail.com		151702875	SUBMITTED	ACTIVE
2023	Yuliko		Leback	12/31/1995 5078						ralph.turner@gmail.com		151702880	SUBMITTED	ACTIVE
2023	Yuliko		Leback	12/31/1995 5078						ralph.turner@gmail.com		151702880	SUBMITTED	ACTIVE
2023	Kristen		Kins	12/31/1995 5009						ralph.turner@gmail.com		151702884	SUBMITTED	ACTIVE
2023	Stephen		Reichel	12/31/1995 5090						ralph.turner@gmail.com		151702886	SUBMITTED	ACTIVE
2023	Stephen		Reichel	12/31/1995 5090						ralph.turner@gmail.com		151702886	SUBMITTED	ACTIVE

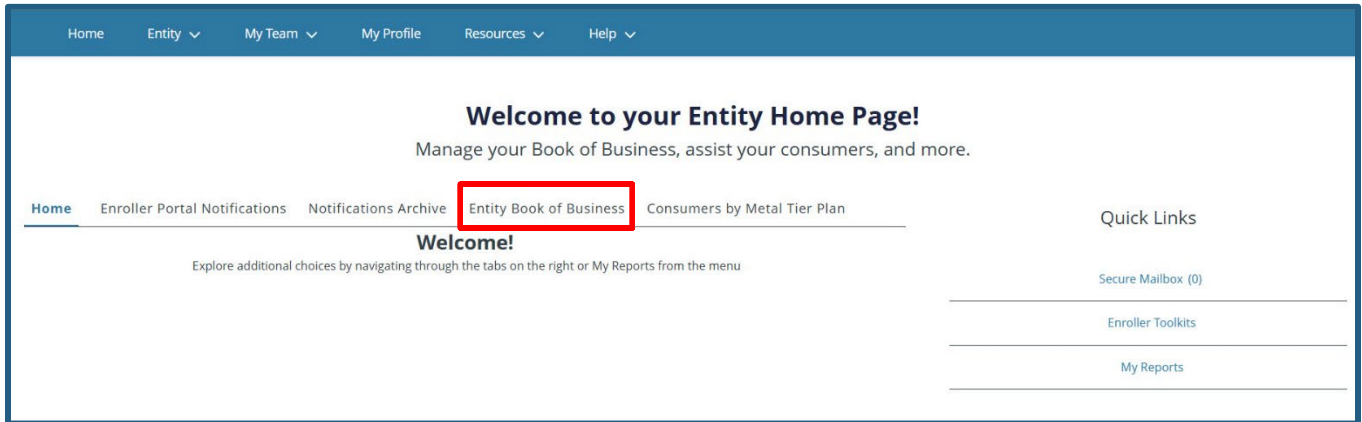
The exported My Book of Business will display your consumers' data.

Year of Application	First Name	Middle Name	Last Name	Customer ID	SSN Last	Residence Address Line	Address - City	Address - State	Address - Zip Code	Customer Email	Customer Phone	CalHEERS Application	Application Status	Case Status
2023	Marcelus		Smith	12/31/1995								151702886	IN PROGRESS	
2023	Toshiko		Ritchie	8/15/2007 7000								151702823	SUBMITTED	ACTIVE
2023	Burns		Akundung	12/5/1975 5136								151702823	SUBMITTED	ACTIVE
2023	Dong		Kassulke	12/31/1995 5004						ralph.turner@gmail.com		151702843	SUBMITTED	ACTIVE
2023	Leonia		Friesen	12/31/1995 5008						ralph.turner@gmail.com		151702847	SUBMITTED	ACTIVE
2023	Leonia		Friesen	12/31/1995 5008						ralph.turner@gmail.com		151702847	SUBMITTED	ACTIVE
2023	Palmer		Russell	12/31/1995 5058						ralph.turner@gmail.com		151702853	SUBMITTED	ACTIVE
2023	Palmer		Russell	12/31/1995 5058						ralph.turner@gmail.com		151702853	SUBMITTED	ACTIVE
2023	Cinda		Bogisch	12/31/1995 7010						ralph.turner@gmail.com		151702875	SUBMITTED	ACTIVE
2023	Cinda		Bogisch	12/31/1995 7010						ralph.turner@gmail.com		151702875	SUBMITTED	ACTIVE
2023	Stephen		Reichel	12/31/1995 5090						ralph.turner@gmail.com		151702886	SUBMITTED	ACTIVE
2023	Stephen		Reichel	12/31/1995 5090						ralph.turner@gmail.com		151702886	SUBMITTED	ACTIVE
2023	Willey		Dooley	12/5/1975 5000								151702896	SUBMITTED	ACTIVE
2023	Willey		Dooley	12/5/1975 5000								151702896	SUBMITTED	ACTIVE
2023	Kelly		Hilpert	8/15/2007 5001								151702896	SUBMITTED	ACTIVE
2023	Scott		Johnston	12/31/1995 5069						ralph.turner@gmail.com		151702902	SUBMITTED	ACTIVE
2023	Scott		Johnston	12/31/1995 5069						ralph.turner@gmail.com		151702902	SUBMITTED	ACTIVE
2023	Bill		Pasocha	12/31/1995 5009						ralph.turner@gmail.com		151702907	SUBMITTED	ACTIVE
2023	Mimi		McKenzie	12/31/1995 5095						ralph.turner@gmail.com		151702928	SUBMITTED	ACTIVE
2023	Keisha		Langworth	12/5/1975 5000								151702936	SUBMITTED	ACTIVE
2023	Keisha		Langworth	12/5/1975 5000								151702936	SUBMITTED	ACTIVE
2023	Veronica		Schoen	8/15/2007 5001								151702936	SUBMITTED	ACTIVE
2023	Bong		Hermiston	12/5/1975 5007								151702943	SUBMITTED	ACTIVE
2023	Bong		Hermiston	12/5/1975 5007								151702943	SUBMITTED	ACTIVE
2023	Hannelore		Paucek	8/15/2007 5108								151702943	SUBMITTED	ACTIVE
2023	Alanna		Convin	12/31/1995 5038						ralph.turner@gmail.com		151702948	SUBMITTED	ACTIVE
2023	Ines		Bosco	12/31/1995 5029						ralph.turner@gmail.com		151702954	SUBMITTED	ACTIVE
2023	Ines		Bosco	12/31/1995 5029						ralph.turner@gmail.com		151702954	SUBMITTED	ACTIVE
2023	Lierne		Gerlach	12/31/1995 5030						ralph.turner@gmail.com		151702961	SUBMITTED	ACTIVE
2023	Dewitt		Comier	12/31/1995 5000						ralph.turner@gmail.com		151702990	SUBMITTED	ACTIVE
2023	Dewitt		Comier	12/31/1995 5000						ralph.turner@gmail.com		151702990	SUBMITTED	ACTIVE
2023	Isiah		Vaun	12/5/1975 7001								151703007	SUBMITTED	ACTIVE
2023	Isiah		Vaun	12/5/1975 7001						ralph.turner@gmail.com		151703007	SUBMITTED	ACTIVE
2023	Keven		Kub	8/15/2007 7002								151703007	SUBMITTED	ACTIVE
2023	Thurman		Schneider	12/31/1995 5097						ralph.turner@gmail.com		151703013	SUBMITTED	ACTIVE
2023	Thurman		Schneider	12/31/1995 5097						ralph.turner@gmail.com		151703013	SUBMITTED	ACTIVE
2023	Oliver		Zemlak	12/31/1995 7007						ralph.turner@gmail.com		151703020	SUBMITTED	ACTIVE

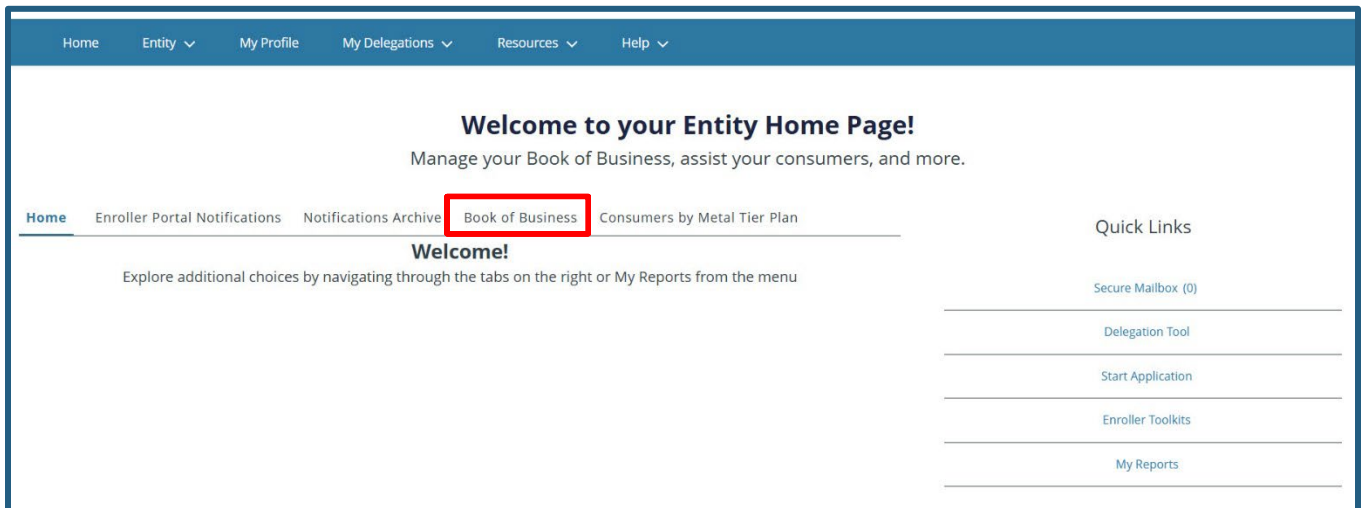
Book of Business Steps for Entity Users

1. Login to the Enroller Portal. Depending on your role, you will see tabs on the home page for the Entity Book of Business and/or your own Book of Business.
 - If you have access to the Entity Book of Business, the Entity Book of Business is displayed on the home page.

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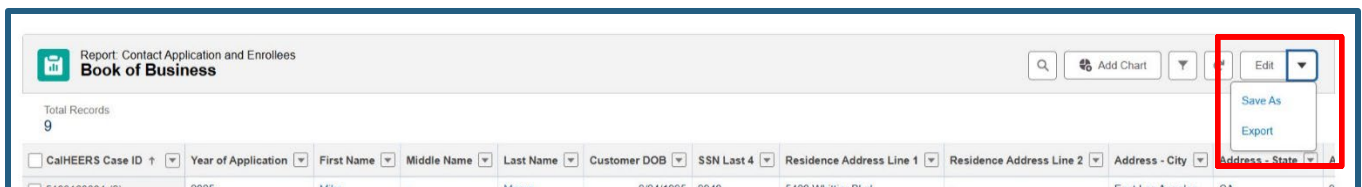


- The Counselor's home page displays the Counselor's Book of Business only.



To view the **Book of Business**, reCAPTCHA is required.

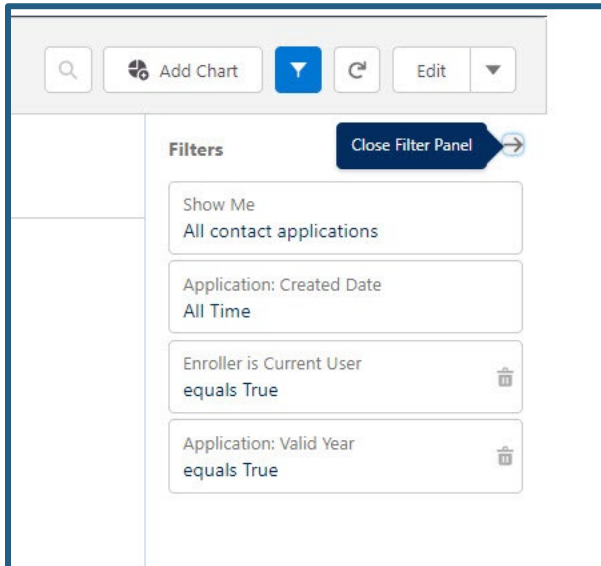
2. Select the checkbox for I am not a robot
3. Select the images provided in the instructions and click **Verify**.
4. Click the dropdown for **Edit**, and then select **Export**.



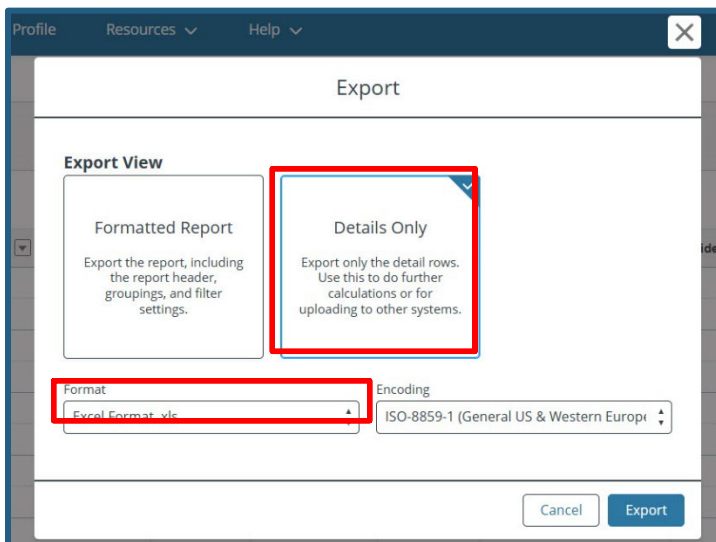
Note: Filters can be applied at this step to speed up the process of downloading the information you require from the Book of Business.

- Click the filter icon in the top-right corner of the *Book of Business / My Book of Business*.

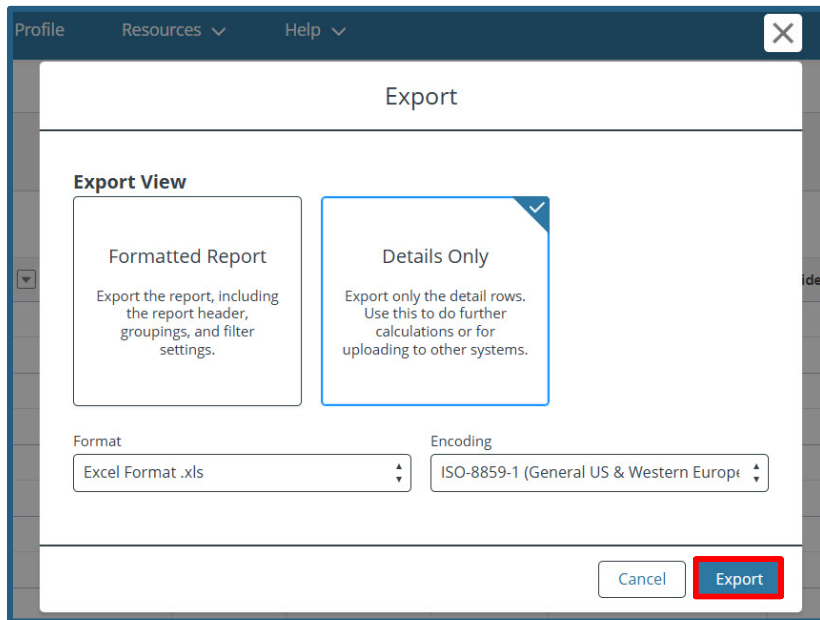
You can filter by contact applications, the date that the application was created, or the valid year.



- Once you have applied the filter of your choice, click Export from the Edit dropdown.
- Select Details Only as the exported view (recommended) and confirm that the format selected is Excel.

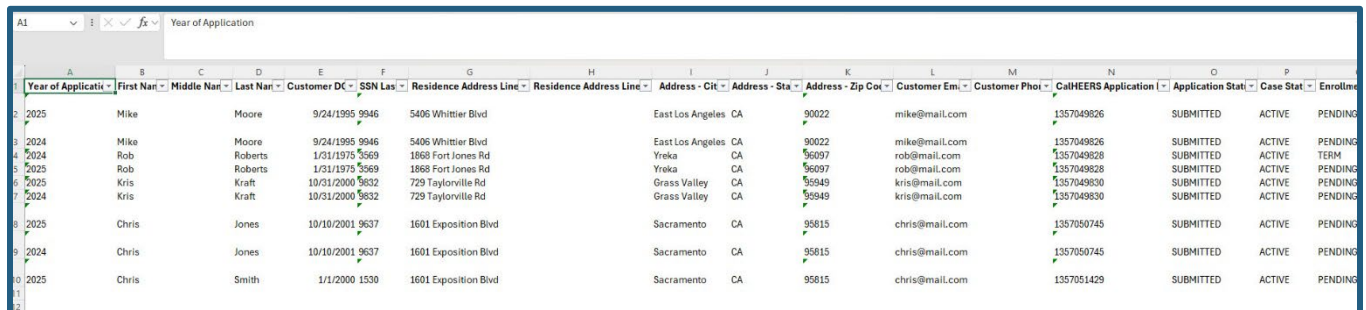


- Click **Export**



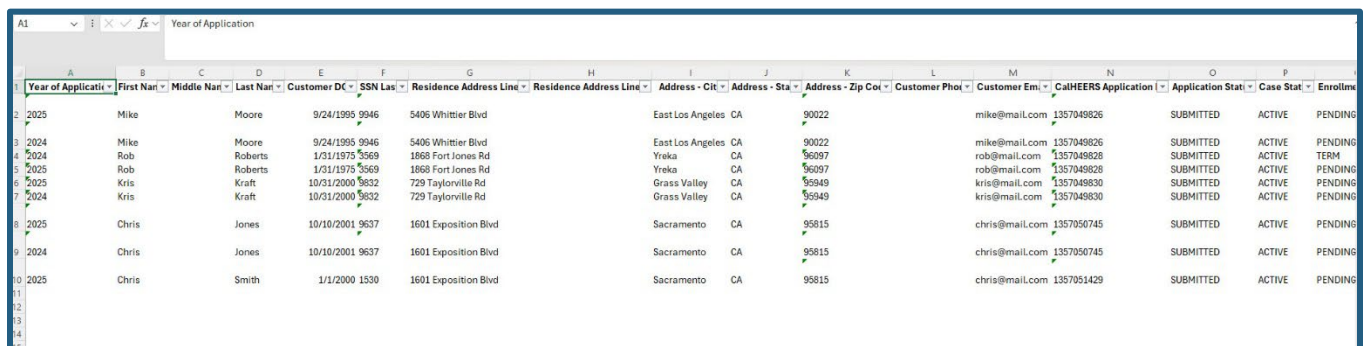
The Book of Business / My Book of Business will export in an Excel file with the consumer data. You will be able to sort and view enrollment data, consumer data, Medi-Cal information, etc. for consumers.

The exported Book of Business will display all consumer data.



Year of Application	First Name	Middle Name	Last Name	Customer ID	SSN	Residence Address Line	Address - City	Address - State	Address - Zip Code	Customer Email	Customer Phone	CalHEERS Application	Application Status	Case Status	Enrollment Status
2025	Mike		Moore	9/24/1995 9946	5406	Whittier Blvd	East Los Angeles	CA	90022	mike@mail.com	1357049826	SUBMITTED	ACTIVE	PENDING	
2024	Mike		Moore	9/24/1995 9946	5406	Whittier Blvd	East Los Angeles	CA	90022	mike@mail.com	1357049826	SUBMITTED	ACTIVE	PENDING	
2024	Rob		Roberts	1/31/1975 5569	1868	Fort Jones Rd	Yreka	CA	96097	rob@mail.com	1357049828	SUBMITTED	ACTIVE	TERM	
2025	Rob		Roberts	1/31/1975 5569	1868	Fort Jones Rd	Yreka	CA	96097	rob@mail.com	1357049828	SUBMITTED	ACTIVE	PENDING	
2025	Kris		Kraft	10/31/2000 9832	729	Taylorville Rd	Grass Valley	CA	95949	kris@mail.com	1357049830	SUBMITTED	ACTIVE	PENDING	
2024	Kris		Kraft	10/31/2000 9832	729	Taylorville Rd	Grass Valley	CA	95949	kris@mail.com	1357049830	SUBMITTED	ACTIVE	PENDING	
2025	Chris		Jones	10/10/2001 9637	1601	Exposition Blvd	Sacramento	CA	95815	chris@mail.com	1357050745	SUBMITTED	ACTIVE	PENDING	
2024	Chris		Jones	10/10/2001 9637	1601	Exposition Blvd	Sacramento	CA	95815	chris@mail.com	1357050745	SUBMITTED	ACTIVE	PENDING	
2025	Chris		Smith	1/1/2000 1530	1601	Exposition Blvd	Sacramento	CA	95815	chris@mail.com	1357051429	SUBMITTED	ACTIVE	PENDING	

The exported My Book of Business will display your consumers' data.

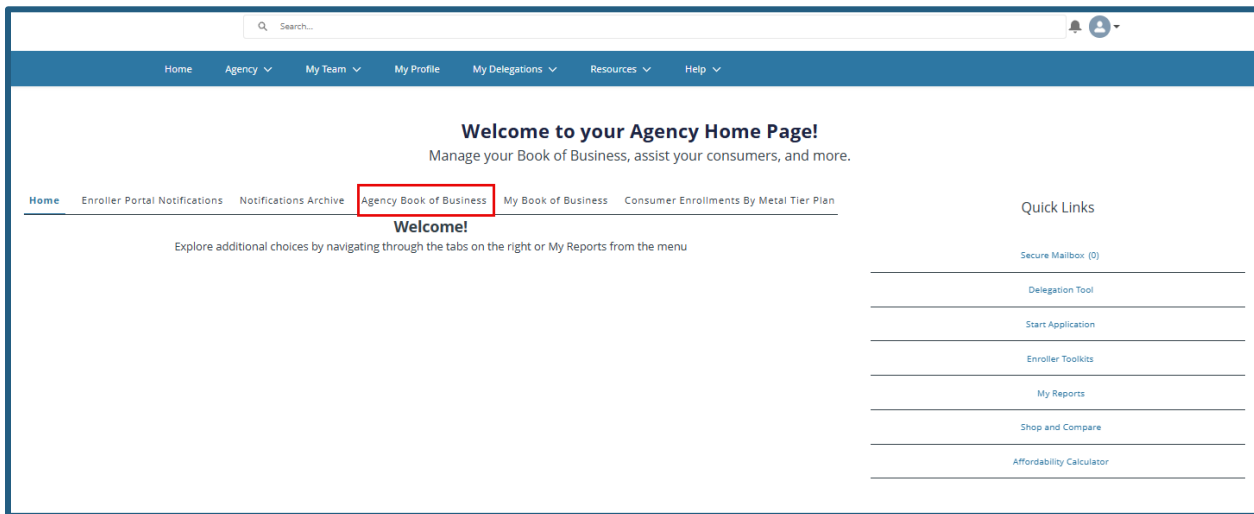


Year of Application	First Name	Middle Name	Last Name	Customer ID	SSN	Residence Address Line	Address - City	Address - State	Address - Zip Code	Customer Email	Customer Phone	CalHEERS Application	Application Status	Case Status	Enrollment Status
2025	Mike		Moore	9/24/1995 9946	5406	Whittier Blvd	East Los Angeles	CA	90022	mike@mail.com	1357049826	SUBMITTED	ACTIVE	PENDING	
2024	Mike		Moore	9/24/1995 9946	5406	Whittier Blvd	East Los Angeles	CA	90022	mike@mail.com	1357049826	SUBMITTED	ACTIVE	PENDING	
2024	Rob		Roberts	1/31/1975 5569	1868	Fort Jones Rd	Yreka	CA	96097	rob@mail.com	1357049828	SUBMITTED	ACTIVE	TERM	
2025	Rob		Roberts	1/31/1975 5569	1868	Fort Jones Rd	Yreka	CA	96097	rob@mail.com	1357049828	SUBMITTED	ACTIVE	PENDING	
2025	Kris		Kraft	10/31/2000 9832	729	Taylorville Rd	Grass Valley	CA	95949	kris@mail.com	1357049830	SUBMITTED	ACTIVE	PENDING	
2024	Kris		Kraft	10/31/2000 9832	729	Taylorville Rd	Grass Valley	CA	95949	kris@mail.com	1357049830	SUBMITTED	ACTIVE	PENDING	
2025	Chris		Jones	10/10/2001 9637	1601	Exposition Blvd	Sacramento	CA	95815	chris@mail.com	1357050745	SUBMITTED	ACTIVE	PENDING	
2024	Chris		Jones	10/10/2001 9637	1601	Exposition Blvd	Sacramento	CA	95815	chris@mail.com	1357050745	SUBMITTED	ACTIVE	PENDING	
2025	Chris		Smith	1/1/2000 1530	1601	Exposition Blvd	Sacramento	CA	95815	chris@mail.com	1357051429	SUBMITTED	ACTIVE	PENDING	

Large Book of Business

For a large Book of Business (100+) following the following steps:

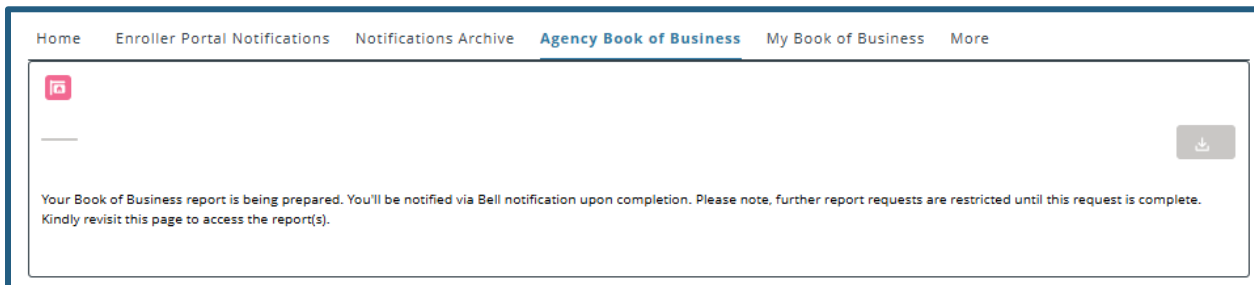
1. Select Agency Book of Business or Entity Book of Business on the Enroller Portal home page



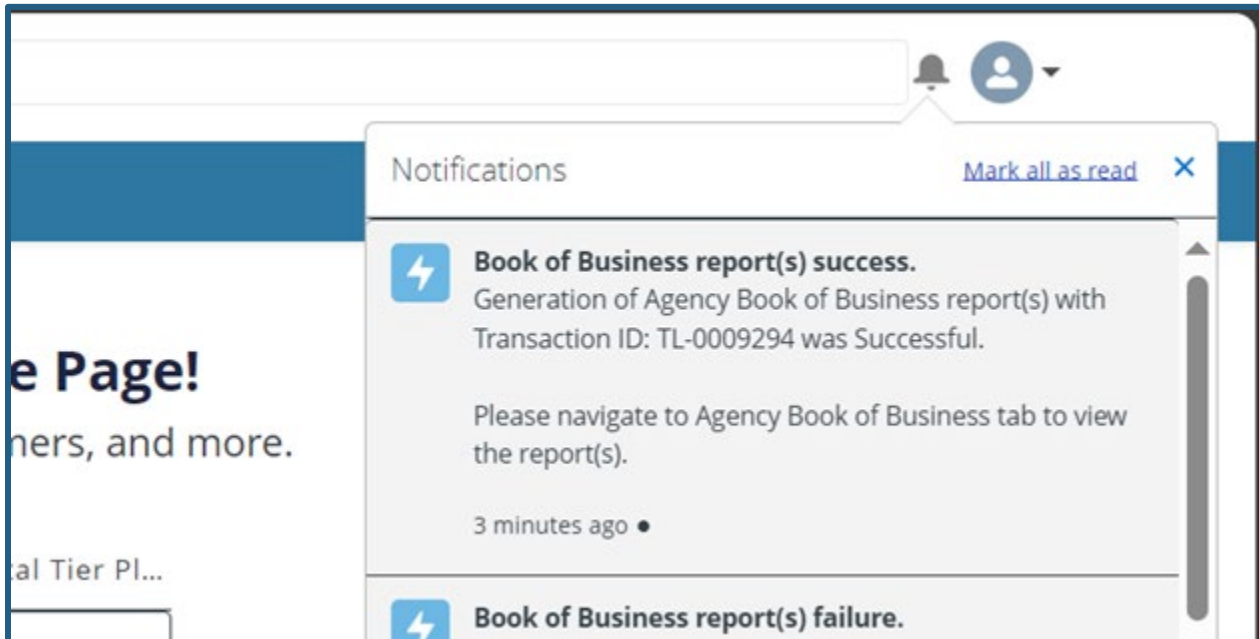
To view the **Book of Business**, reCAPTCHA is required.

2. Select the checkbox for I am not a robot
3. Select the images provided in the instructions and click **Verify**.

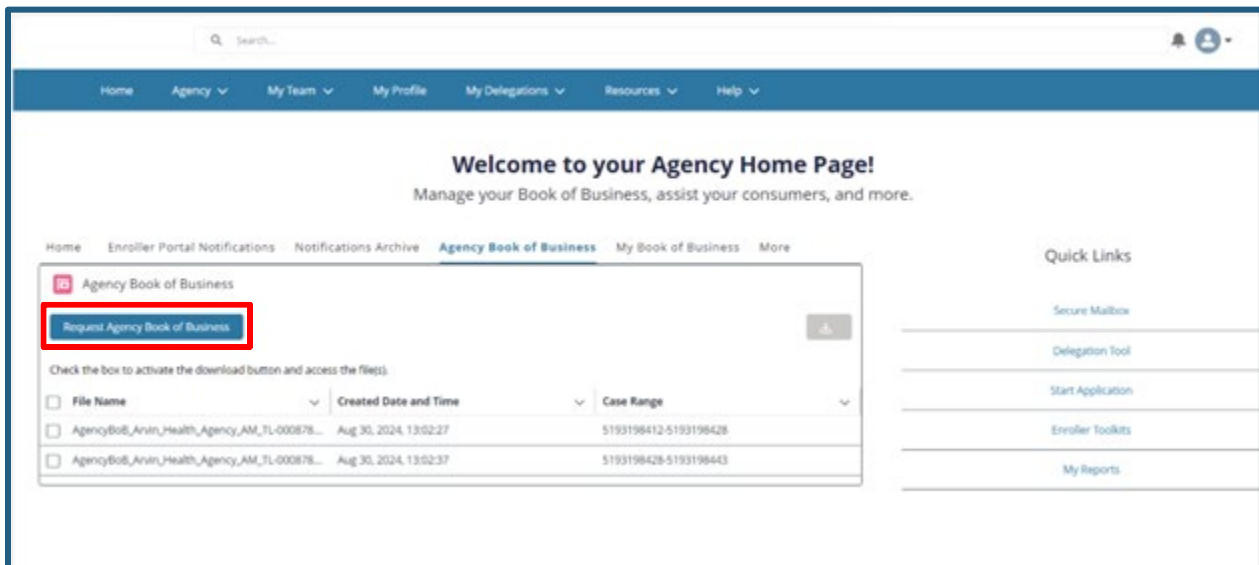
A notification will populate that the report is being downloaded. Navigating away from the page will not affect the download.



Once the download is complete, a bell notification will display.



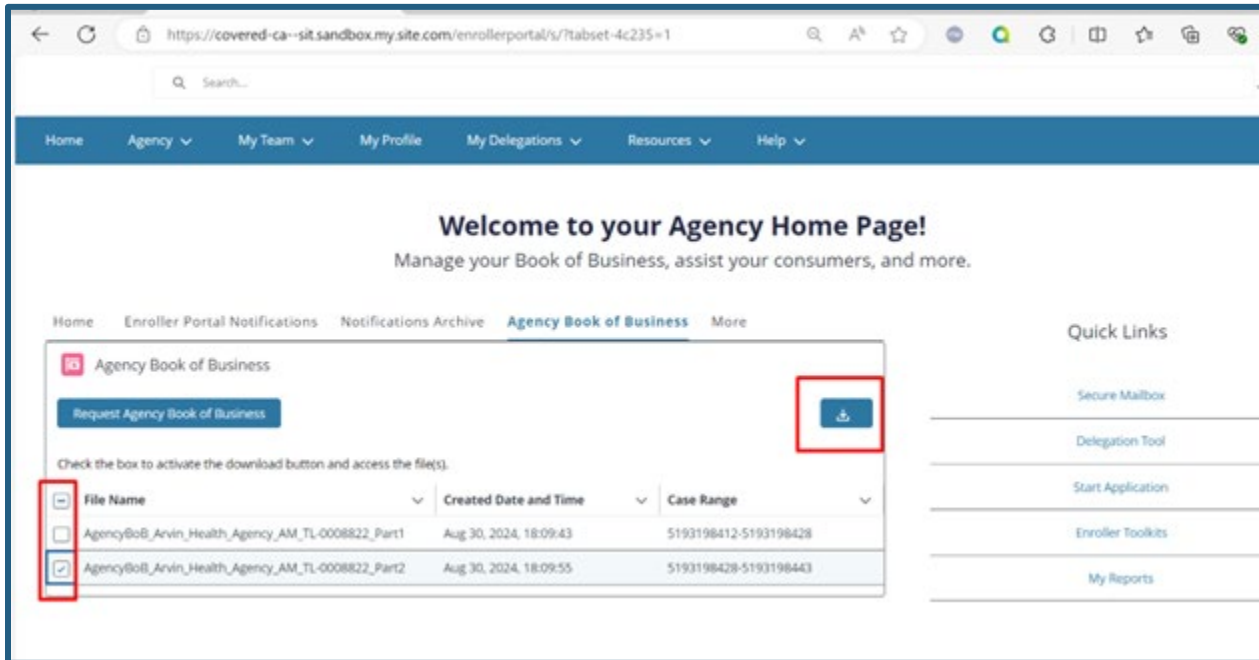
4. Select the **Request Agency/Entity Book of Business** button



When the Book of Business is ready to be downloaded, there will be several reports generated.

5. Check the checkboxes of the reports you want to export and select the **Export** button in the top right corner.

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https://covered-ca--sit.sandbox.my.site.com/enrollerportal/s/?tabset=4c235+1

Search...

Home Agency My Team My Profile My Delegations Resources Help

Welcome to your Agency Home Page!

Manage your Book of Business, assist your consumers, and more.

Home Enroller Portal Notifications Notifications Archive **Agency Book of Business** More

Agency Book of Business

Request Agency Book of Business

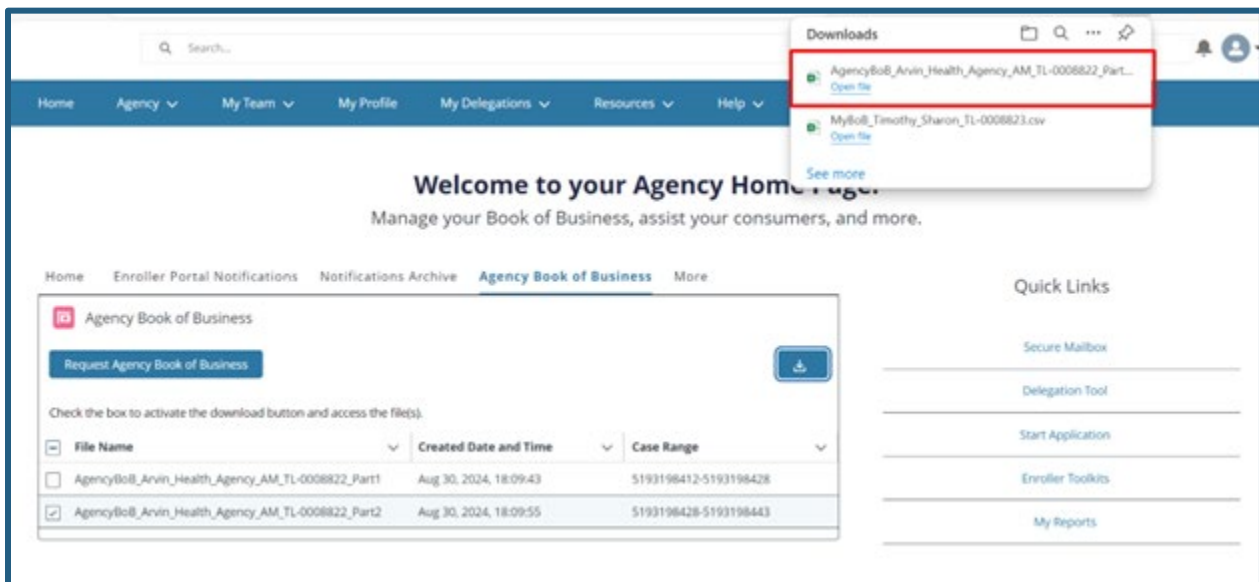
Check the box to activate the download button and access the file(s).

<input type="checkbox"/>	File Name	Created Date and Time	Case Range
<input type="checkbox"/>	AgencyBoB_Arvin_Health_Agency_AM_TL-0008822_Part1	Aug 30, 2024, 18:09:43	5193198412-5193198428
<input checked="" type="checkbox"/>	AgencyBoB_Arvin_Health_Agency_AM_TL-0008822_Part2	Aug 30, 2024, 18:09:55	5193198428-5193198443

Quick Links

- Secure Mailbox
- Delegation Tool
- Start Application
- Enroller Toolkits
- My Reports

The reports will download as Excel files.



Search...

Home Agency My Team My Profile My Delegations Resources Help

Welcome to your Agency Home Page!

Manage your Book of Business, assist your consumers, and more.

Home Enroller Portal Notifications Notifications Archive **Agency Book of Business** More

Agency Book of Business

Request Agency Book of Business

Check the box to activate the download button and access the file(s).

<input type="checkbox"/>	File Name	Created Date and Time	Case Range
<input type="checkbox"/>	AgencyBoB_Arvin_Health_Agency_AM_TL-0008822_Part1	Aug 30, 2024, 18:09:43	5193198412-5193198428
<input checked="" type="checkbox"/>	AgencyBoB_Arvin_Health_Agency_AM_TL-0008822_Part2	Aug 30, 2024, 18:09:55	5193198428-5193198443

Quick Links

- Secure Mailbox
- Delegation Tool
- Start Application
- Enroller Toolkits
- My Reports

Downloads

- AgencyBoB_Arvin_Health_Agency_AM_TL-0008822_Part...
Open file
- MyBoB_Timothy_Sharon_TL-0008823.csv
Open file
- See more

Targeted Reports Steps

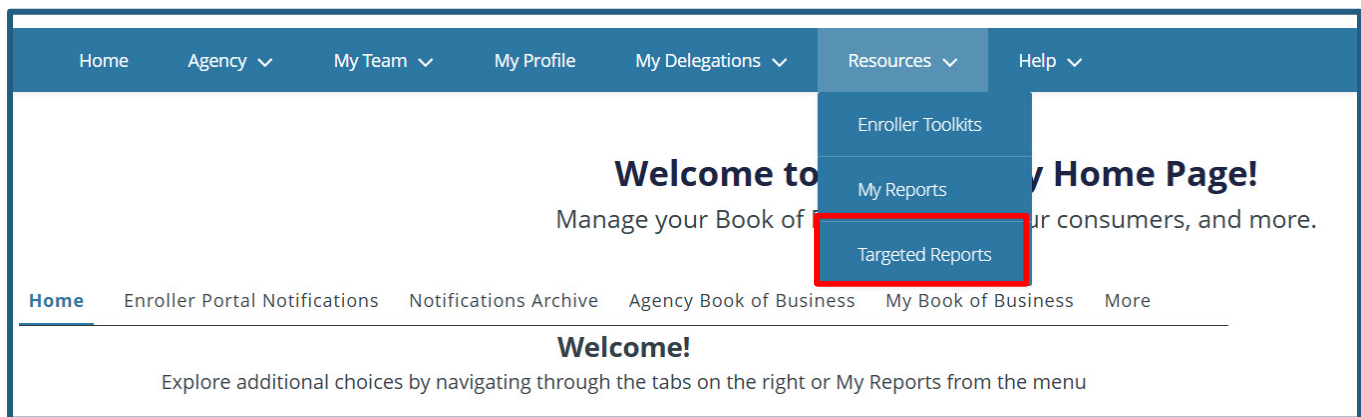
Targeted Reports are available for all Entity and Agency users.

Enrollers will be able to view and export the following targeted reports:

- Delegations lost
- Consumer cases by carrier
- Active consumers only

To get to these reports, follow the below steps:

1. From the *Resources* dropdown on the Enroller Portal Home page, select **Targeted Reports**

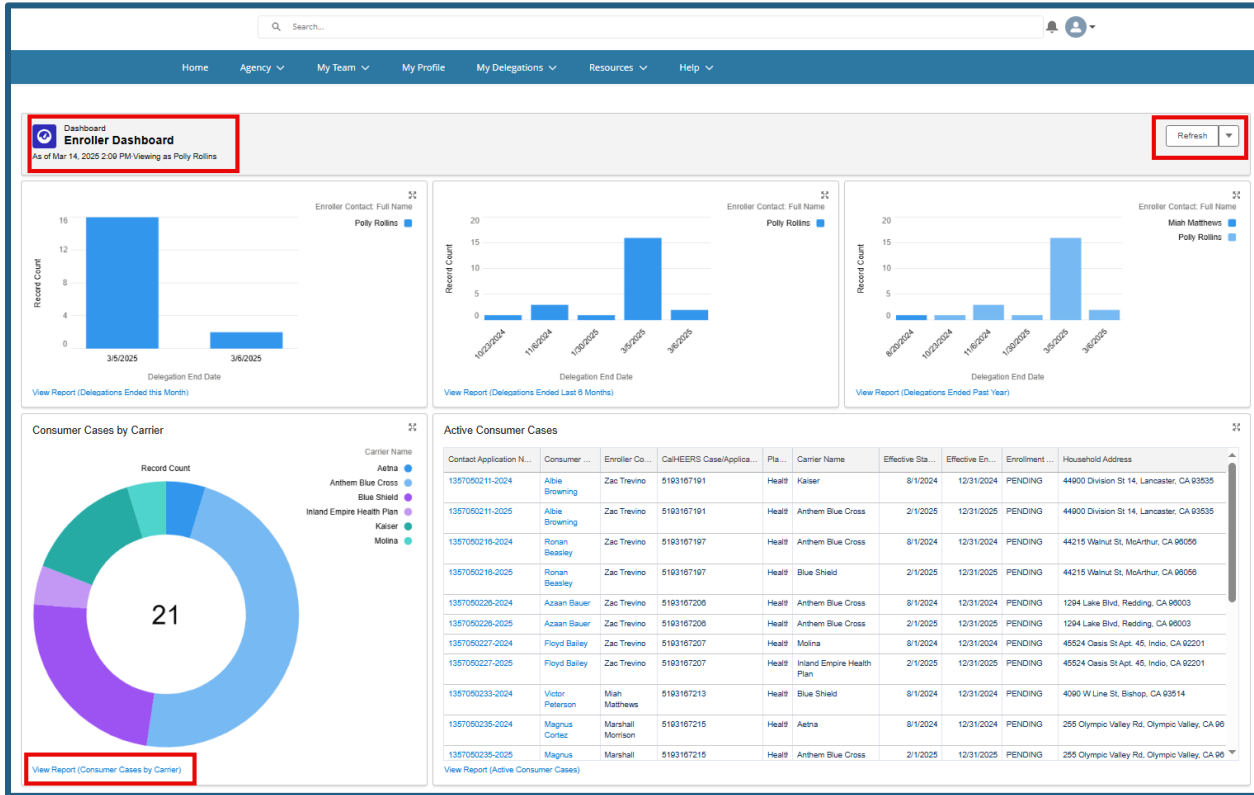


The *Enroller Dashboard* displays the following:

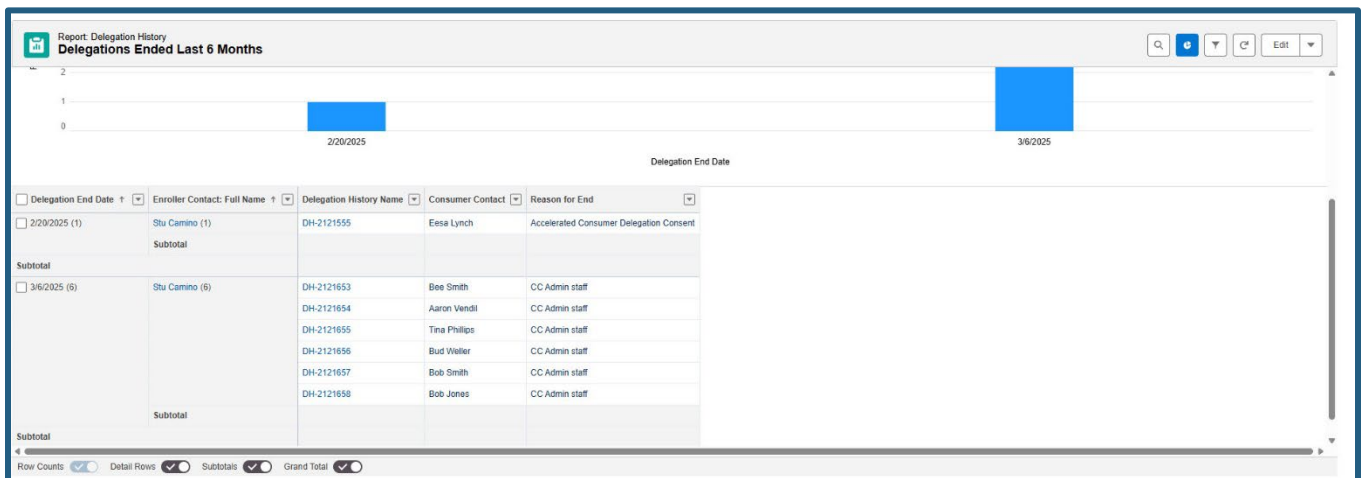
- Delegations Ended this Month (calendar month)
- Delegations Ended Last 6 Months
- Delegations Ended Past Year
- Consumer Cases by Carrier
- Active Consumer Cases

Enroller Portal My Reports Task Guide

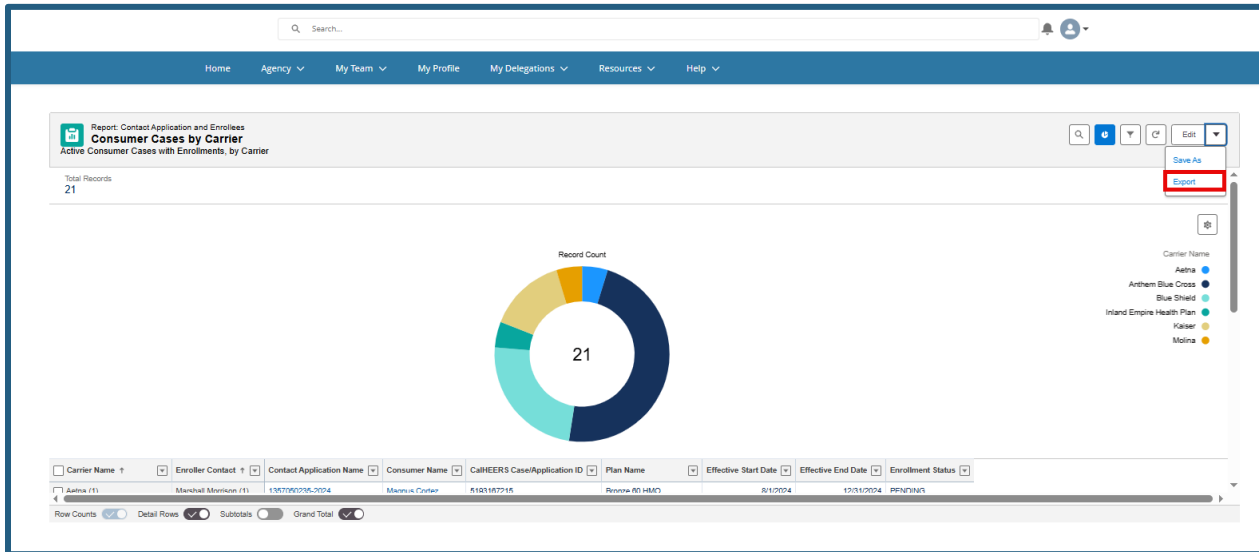
The left upper corner provides the date the report was last refreshed. The Right upper corner provides a refresh button to update the report.



- Clicking the hyperlink for each report pulls up the report details



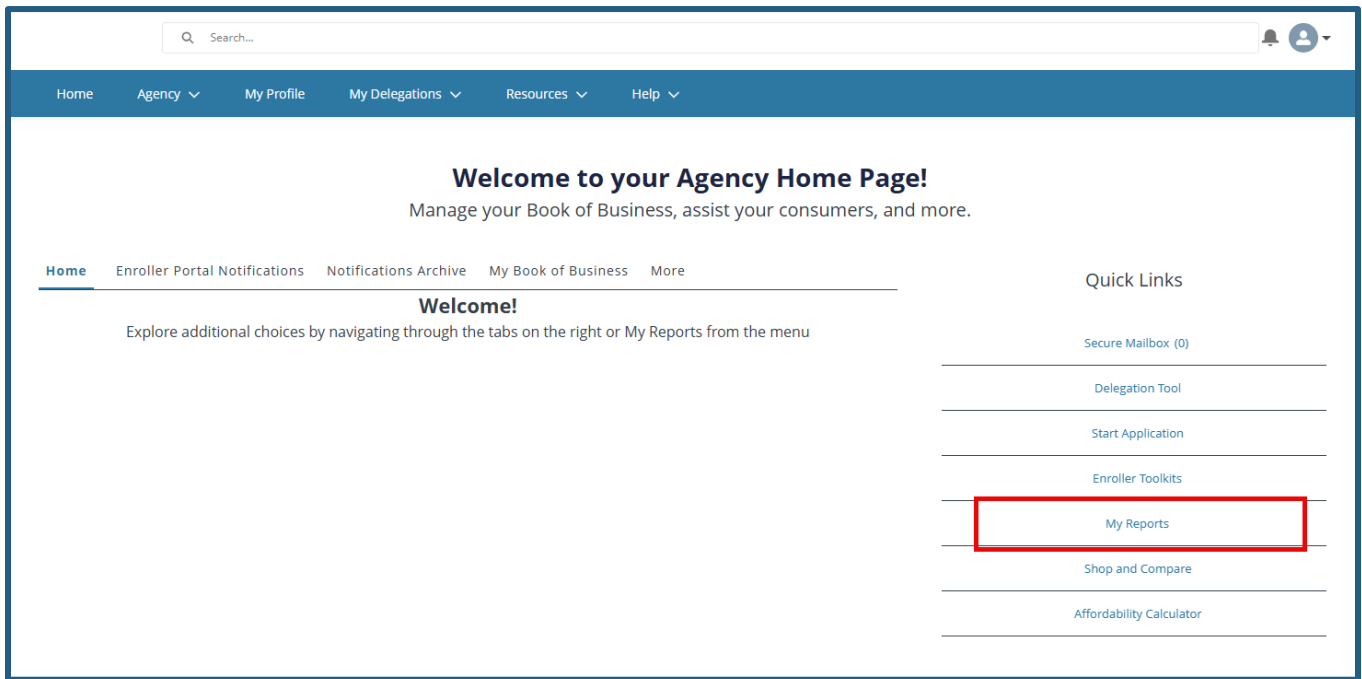
- To export a report, click the **Edit** dropdown and select **Export**.



My Reports Steps

These steps inform users how to access My Reports to view, export, search, and filter different features for different report categories. Enrollers also can customize existing reports within the portal.

1. Login to your Agent Portal and select My Reports under Quick Links
 - Displays for AS Level 1, and 2, AM Level 1 and 2, Agent 1 and 2, and AAS users



Welcome to your Agency Home Page!
Manage your Book of Business, assist your consumers, and more.

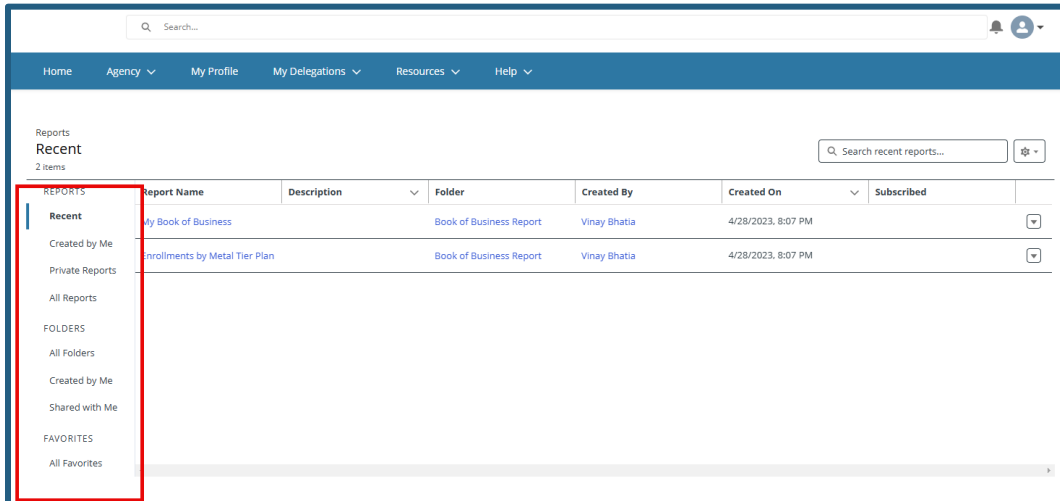
Home | Enroller Portal Notifications | Notifications Archive | My Book of Business | More

Welcome!
Explore additional choices by navigating through the tabs on the right or My Reports from the menu

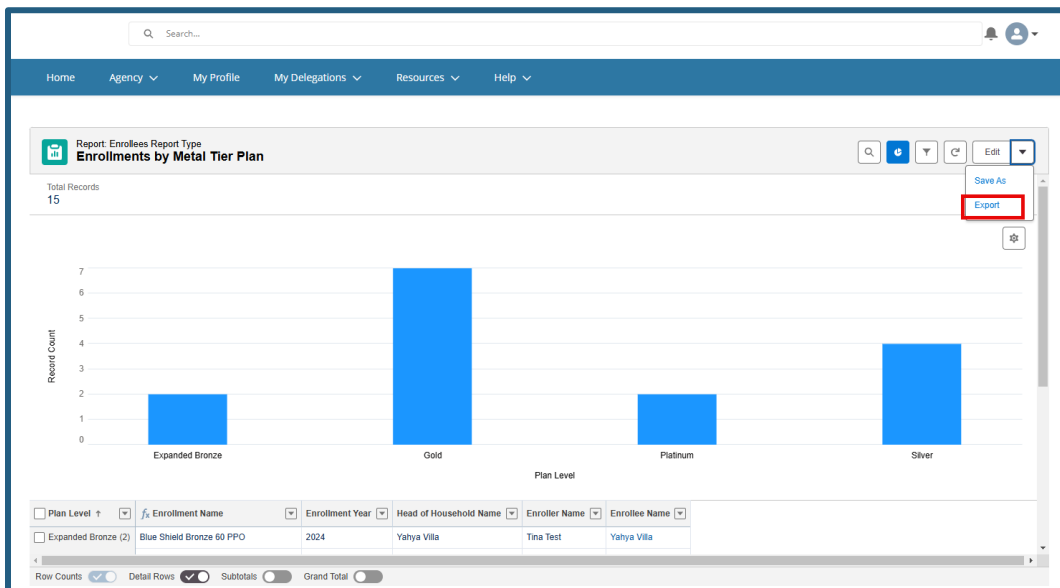
Quick Links

- Secure Mailbox (0)
- Delegation Tool
- Start Application
- Enroller Toolkits
- My Reports**
- Shop and Compare
- Affordability Calculator

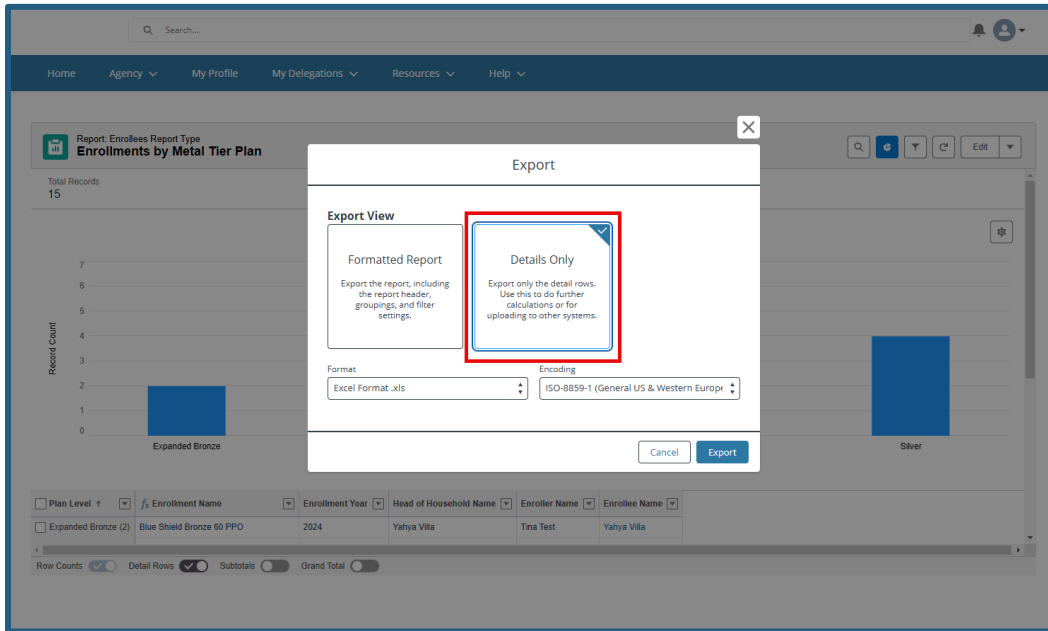
- Use the navigation pane on the right-hand side to select the appropriate report



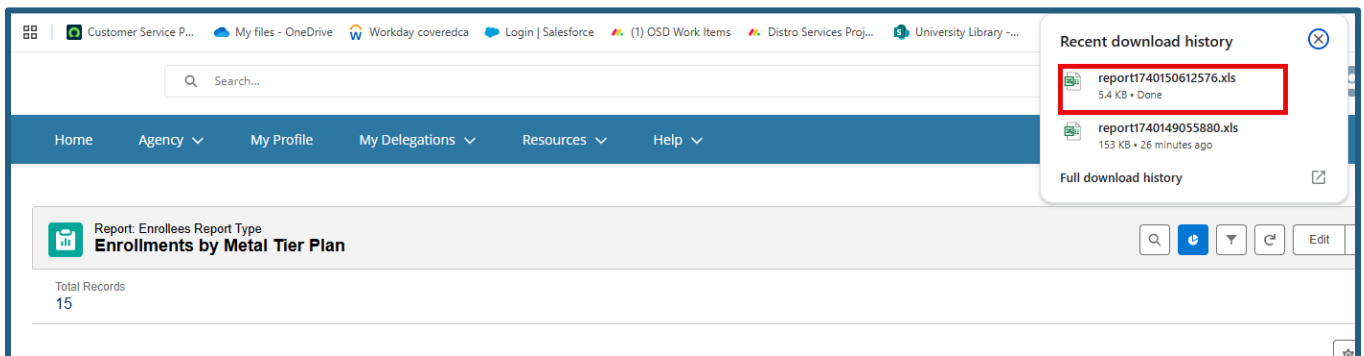
- To export the desired report, navigate to the down arrow dropdown on the right-hand side and select **Export**.



- Select **Details Only** as the exported view (recommended) and confirm that the format selected is Excel.



5. Click **Export**
6. The file will download as an Excel file



7. Open the Excel file
8. Click **Enable Editing**



Enroller Portal My Reports Task Guide

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Enrollment Name	Enrollment Year	Head of Household Name	Enroller Name	Enrollee Name	Plan Level								
1	Blue Shield Bronze 60 PPO	2024	Yahya Villa	Tina Test	Yahya Villa	Expanded Bronze								
2	Aetna Bronze 60 HMO	2024	Mister Daca	Tina Test	Mister Daca	Expanded Bronze								
3	Blue Shield Gold 80 PPO	2024	Mike Mitchel	Tina Test	Mike Mitchel	Gold								
4	Western Health Gold 80 HMO	2024	Ashley Banks	Tina Test	Ashley Banks	Gold								
5	Western Health Gold 80 HMO	2024	Ashley Banks	Tina Test	Alex Banks	Gold								
6	Western Health Gold 80 HMO	2024	Ashley Banks	Tina Test	Aidan Banks	Gold								
7	Western Health Gold 80 HMO	2024	Ashley Banks	Tina Test	Adam Banks	Gold								
8	Blue Shield Gold 80 PPO	2025	Mike Mitchel	Tina Test	Mike Mitchel	Gold								
9	Blue Shield Gold 80 PPO	2025	Mike Mitchel	Tina Test	Mich Mitchell	Gold								
10	Blue Shield Platinum 90 PPO	2024	Kim Tucker	Tina Test	Kim Tucker	Platinum								
11	Blue Shield Platinum 90 PPO	2025	Kim Tucker	Tina Test	Kim Tucker	Platinum								
12	Health Net-HMO Silver 70 Ambetter PPO	2024	Mike Mitchel	Tina Test	Mike Mitchel	Silver								
13	Blue Shield Silver 70 HMO	2024	Mike Mitchel	Tina Test	Mike Mitchel	Silver								
14	Anthem Blue Cross Silver 70 HMO	2024	Happy Gilmore	Tina Test	Happy Gilmore	Silver								
15	Anthem Blue Cross Silver 73 EPO	2025	Yahya Villa	Tina Test	Yahya Villa	Silver								
16														
17														

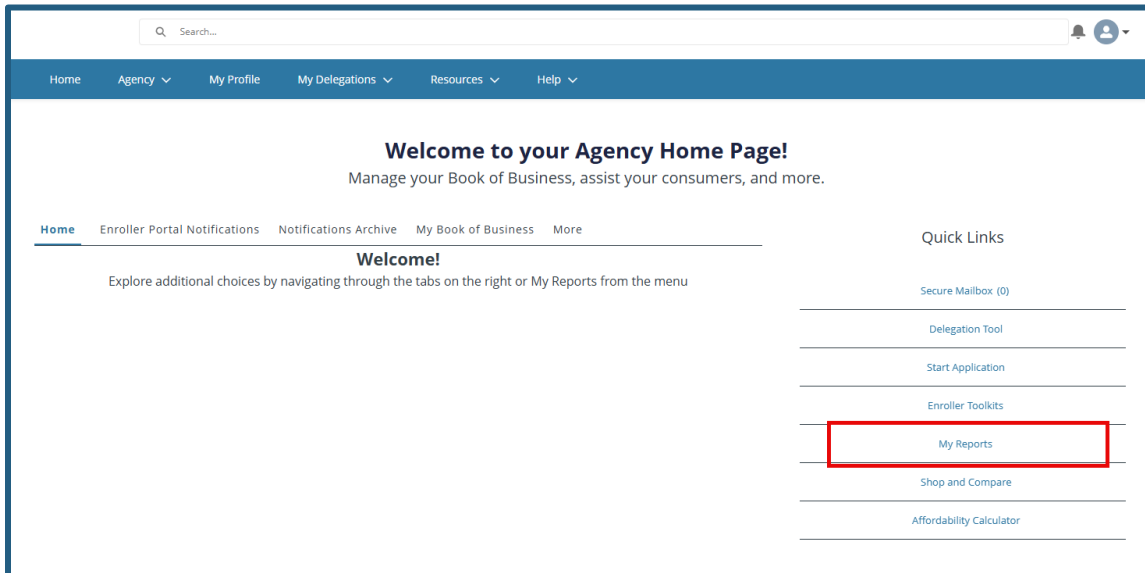
9. The columns are now able to be filtered

O11

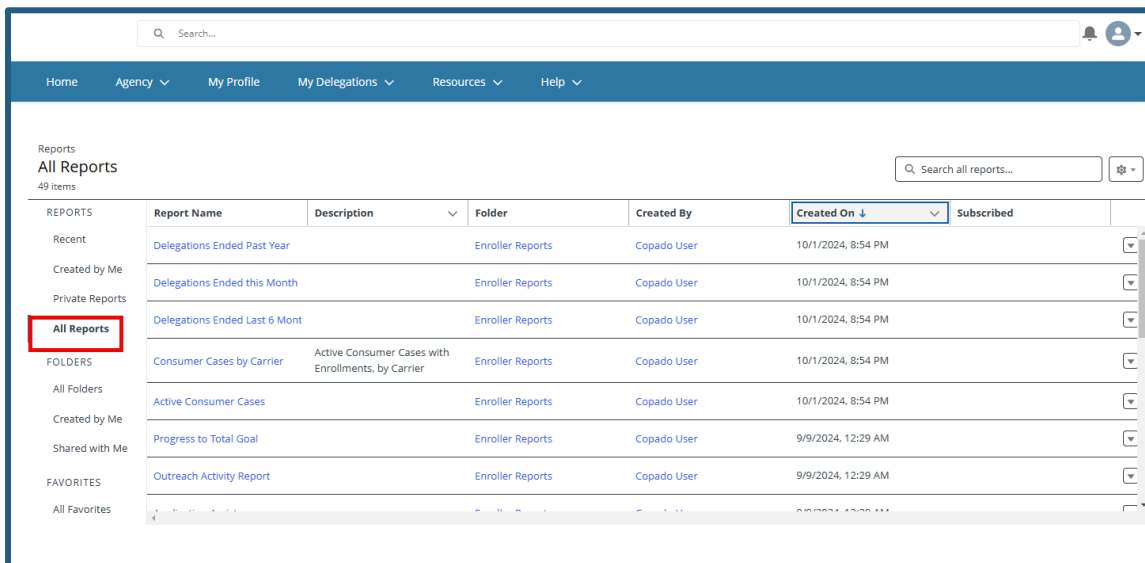
	A	B	C	D	E	F	G
	Enrollment Name	Enrollment Year	Head of Household Name	Enroller Name	Enrollee Name	Plan Level	
1	Blue Shield Bro	Sort A to Z	Yahya Villa	Tina Test	Yahya Villa	Expanded Bronze	
2	Aetna Bronze 6	Sort Z to A	Mister Daca	Tina Test	Mister Daca	Expanded Bronze	
3	Blue Shield Go		Mike Mitchel	Tina Test	Mike Mitchel	Gold	
4	Western Health	Sort by Color	Ashley Banks	Tina Test	Ashley Banks	Gold	
5	Western Health		Ashley Banks	Tina Test	Alex Banks	Gold	
6	Western Health	Sheet View	Ashley Banks	Tina Test	Aidan Banks	Gold	
7	Western Health		Ashley Banks	Tina Test	Adam Banks	Gold	
8	Blue Shield Go	Clear Filter From "Enrollment Year"	Mike Mitchel	Tina Test	Mike Mitchel	Gold	
9	Blue Shield Go	Filter by Color	Mike Mitchel	Tina Test	Mich Mitchell	Gold	
10	Blue Shield Pla	Text Filters	Kim Tucker	Tina Test	Kim Tucker	Platinum	
11	Blue Shield Pla		Kim Tucker	Tina Test	Kim Tucker	Platinum	
12	Health Net-HM	Search	Mike Mitchel	Tina Test	Mike Mitchel	Silver	
13	Blue Shield Silv		Mike Mitchel	Tina Test	Mike Mitchel	Silver	
14	Anthem Blue C	<input checked="" type="checkbox"/> (Select All)	Happy Gilmore	Tina Test	Happy Gilmore	Silver	
15	Anthem Blue C	<input checked="" type="checkbox"/> 2024	Yahya Villa	Tina Test	Yahya Villa	Silver	
16		<input checked="" type="checkbox"/> 2025					
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							

Filtering Reports in the Enroller Portal

1. Select **My Reports** on the Enroller Portal home page



2. Select **All Reports** on the left-hand side



3. Use the dropdown arrows to filter for *Description*, *Created By*, or *Created On*



Enroller Portal My Reports Task Guide

Search...

Home Agency My Profile My Delegations Resources Help

Reports

All Reports 49 items

Search all reports...

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consumer Cases by Carrier	Active Consumer Cases with Enrollments, by Carrier	Enroller Reports	Copado User	10/1/2024, 8:54 PM	
Created by Me	Active Consumer Cases		Enroller Reports	Copado User	10/1/2024, 8:54 PM	
Private Reports	Delegations Ended Past Year		Enroller Reports	Copado User	10/1/2024, 8:54 PM	
All Reports	Delegations Ended this Month		Enroller Reports	Copado User	10/1/2024, 8:54 PM	
FOLDERS	Application Assistance		Enroller Reports	Copado User	9/9/2024, 12:29 AM	
All Folders	Outreach Activity Report		Enroller Reports	Copado User	9/9/2024, 12:29 AM	
Created by Me	Progress to Total Goal		Enroller Reports	Copado User	9/9/2024, 12:29 AM	
Shared with Me						
FAVORITES						
All Favorites						

Customize Reports

1. Go to *My Reports* link under the Quick Links.

Search...

Home Agency My Team My Profile My Delegations Resources Help

Welcome to your Agency Home Page!
Manage your Book of Business, assist your consumers, and more.

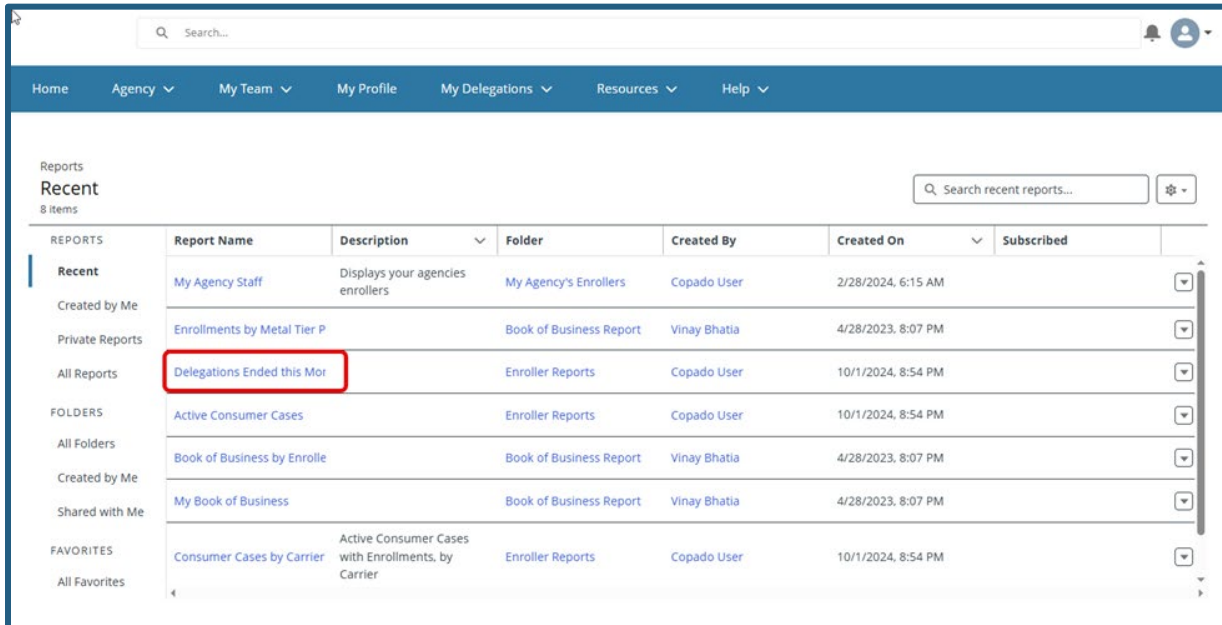
Home Enroller Portal Notifications Notifications Archive Agency Book of Business More

Welcome!
Explore additional choices by navigating through the tabs on the right or My Reports from the menu

Quick Links

- Secure Mailbox (0)
- Delegation Tool
- Start Application
- Enroller Toolkits
- My Reports
- Shop and Compare
- Affordability Calculator

2. In the example, select **Delegations Ended this Month**



Search...

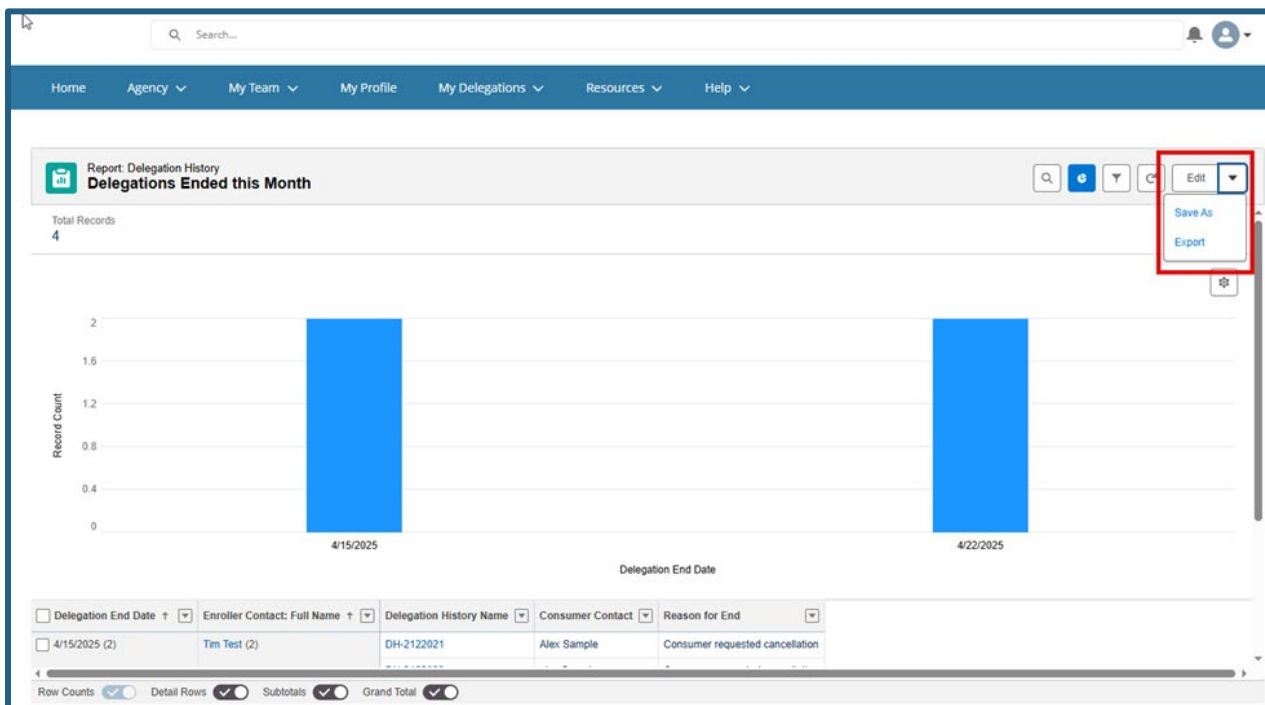
Home Agency My Team My Profile My Delegations Resources Help

Reports
Recent
8 items

Search recent reports...

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	My Agency Staff	Displays your agencies enrollers	My Agency's Enrollers	Copado User	2/28/2024, 6:15 AM	
Created by Me	Enrollments by Metal Tier P		Book of Business Report	Vinay Bhatia	4/28/2023, 8:07 PM	
Private Reports	Delegations Ended this Month		Enroller Reports	Copado User	10/1/2024, 8:54 PM	
All Reports	Active Consumer Cases		Enroller Reports	Copado User	10/1/2024, 8:54 PM	
FOLDERS	Book of Business by Enrollee		Book of Business Report	Vinay Bhatia	4/28/2023, 8:07 PM	
All Folders	My Book of Business		Book of Business Report	Vinay Bhatia	4/28/2023, 8:07 PM	
Created by Me	Consumer Cases by Carrier	Active Consumer Cases with Enrollments, by Carrier	Enroller Reports	Copado User	10/1/2024, 8:54 PM	
Shared with Me						
FAVORITES						
All Favorites						

- Selecting **Edit** allows the user to add rows and columns for the dropdowns. The **Filter** option allows the user to change preset filters such as application year



Search...

Home Agency My Team My Profile My Delegations Resources Help

Report: Delegation History
Delegations Ended this Month

Total Records
4

Record Count

Delegation End Date

4/15/2025 4/22/2025

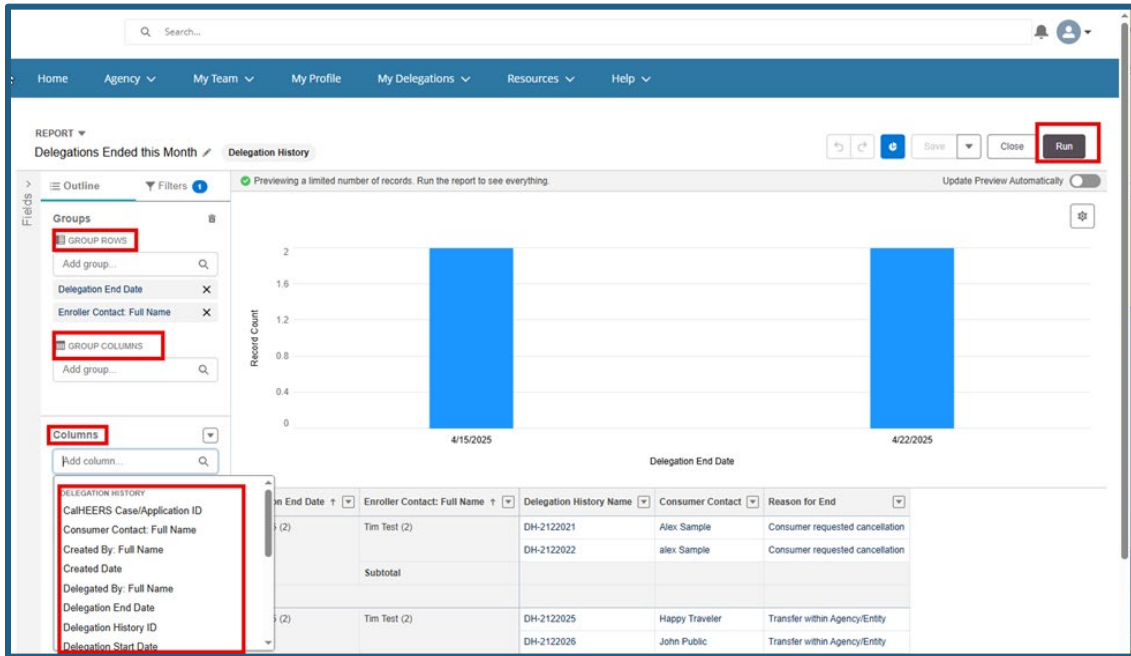
Delegation End Date Enroller Contact: Full Name Delegation History Name Consumer Contact Reason for End

4/15/2025 (2) Tim Test (2) DH-2122021 Alex Sample Consumer requested cancellation

Row Counts Detail Rows Subtotals Grand Total

Edit Save As Export

3. After selections to customize, select the **Run** button on the upper right.



REPORT ▾
Delegations Ended this Month ▾ Delegation History

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Fields

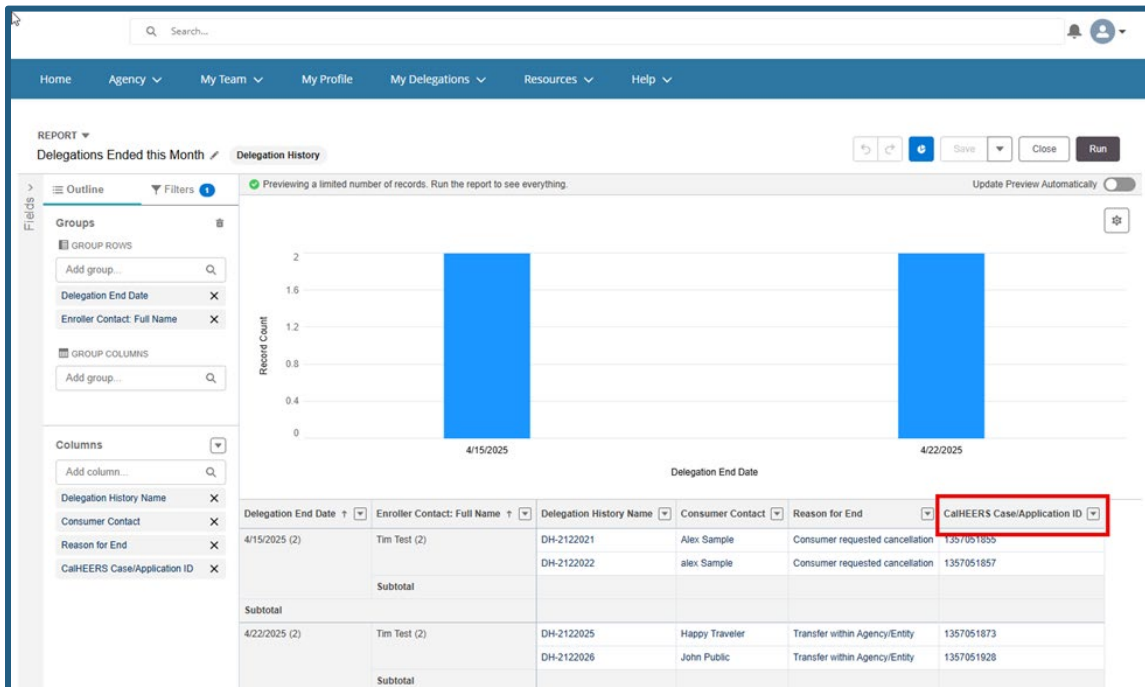
- GROUP ROWS
 - Add group...
 - Delegation End Date
 - Enroller Contact: Full Name
- GROUP COLUMNS
 - Add group...
- Columns
 - Add column...
 - DELEGATION HISTORY
 - CalHEERS Case/Application ID
 - Consumer Contact: Full Name
 - Created By: Full Name
 - Created Date
 - Delegated By: Full Name
 - Delegation End Date
 - Delegation History ID
 - Delegation Start Date

Record Count

Delegation End Date

Delegation End Date	Enroller Contact: Full Name	Delegation History Name	Consumer Contact	Reason for End
(2)	Tim Test (2)	DH-2122021	Alex Sample	Consumer requested cancellation
		DH-2122022	alex Sample	Consumer requested cancellation
	Subtotal			
(2)	Tim Test (2)	DH-2122025	Happy Traveler	Transfer within Agency/Entity
		DH-2122026	John Public	Transfer within Agency/Entity
	Subtotal			

- The columns have been updated with the additional column selection



REPORT ▾
Delegations Ended this Month ▾ Delegation History

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Fields

- GROUP ROWS
 - Add group...
 - Delegation End Date
 - Enroller Contact: Full Name
- GROUP COLUMNS
 - Add group...
- Columns
 - Add column...
 - Delegation History Name
 - Consumer Contact
 - Reason for End
 - CalHEERS Case/Application ID

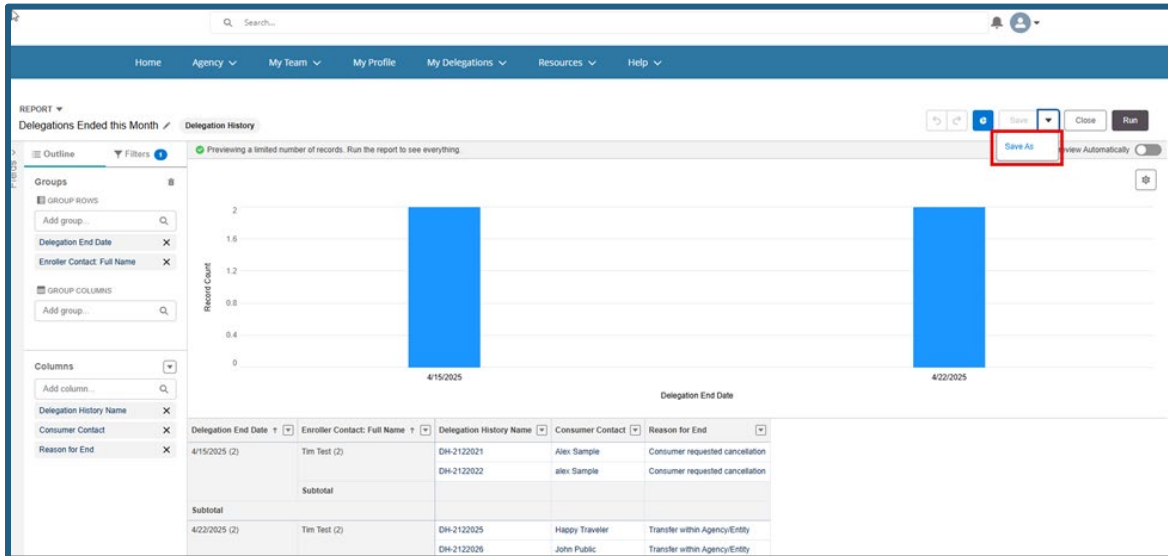
Record Count

Delegation End Date

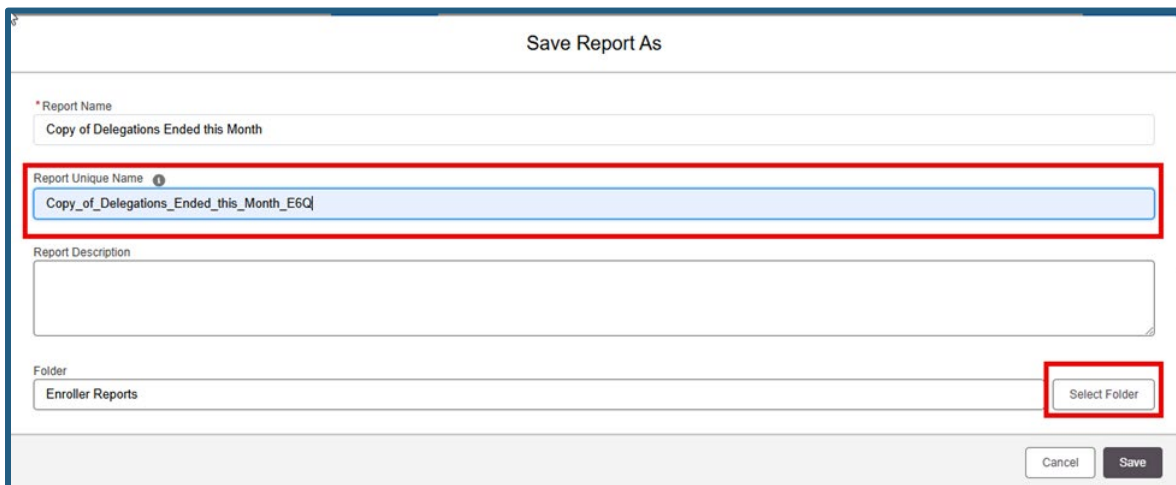
Delegation End Date	Enroller Contact: Full Name	Delegation History Name	Consumer Contact	Reason for End	CalHEERS Case/Application ID
4/15/2025 (2)	Tim Test (2)	DH-2122021	Alex Sample	Consumer requested cancellation	1357051855
		DH-2122022	alex Sample	Consumer requested cancellation	1357051857
	Subtotal				
4/22/2025 (2)	Tim Test (2)	DH-2122025	Happy Traveler	Transfer within Agency/Entity	1357051873
		DH-2122026	John Public	Transfer within Agency/Entity	1357051928
	Subtotal				

- The customized report can be saved to your Enroller Portal.

4. Select **Save As** from the dropdown.



- The *Report Unique Name* is auto populated when the user clicks in the field.



Save Report As

* Report Name
Copy of Delegations Ended this Month

Report Unique Name ⓘ
Copy_of_Delegations_Ended_this_Month_E6Q

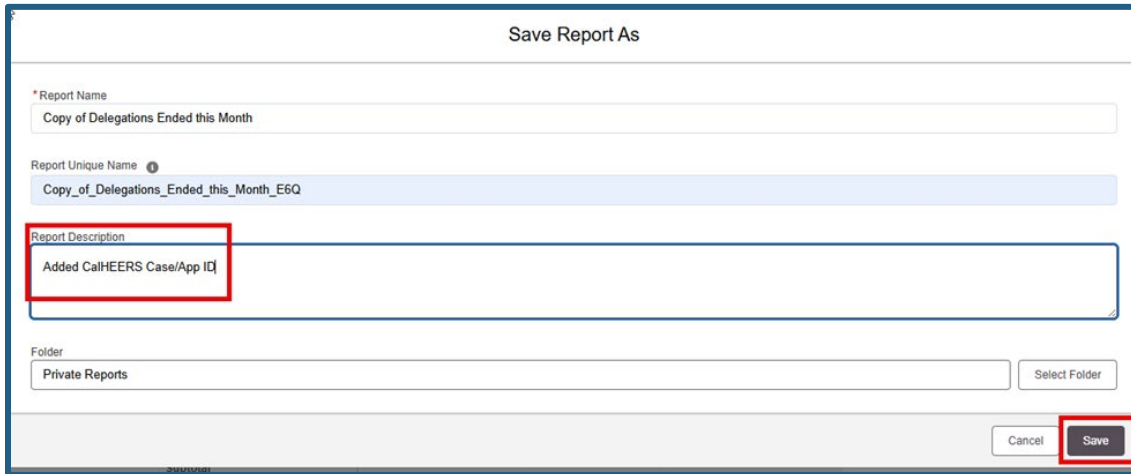
Report Description

Folder
Enroller Reports Select Folder

Cancel Save

The report description is free text.

5. Click the **Select Folder** button after entering the description.



Save Report As

* Report Name
Copy of Delegations Ended this Month

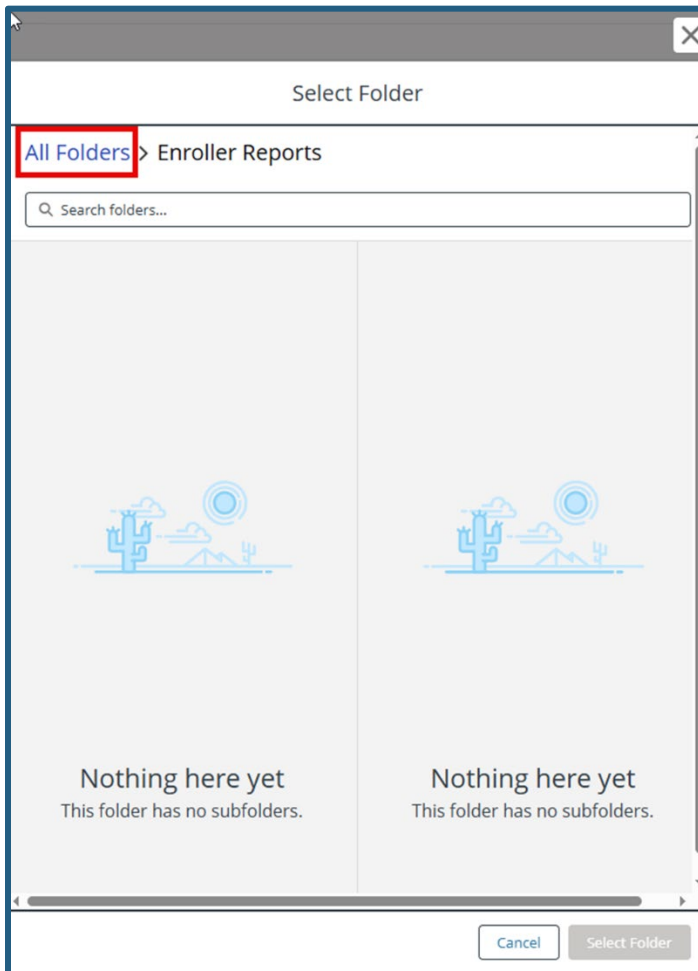
Report Unique Name
Copy_of_Delegations_Ended_this_Month_E6Q

Report Description
Added CalHEERS Case/App ID

Folder
Private Reports

Cancel Save

6. Click the **All Folders** link on the next screen.



Select Folder

All Folders > Enroller Reports

Search folders...

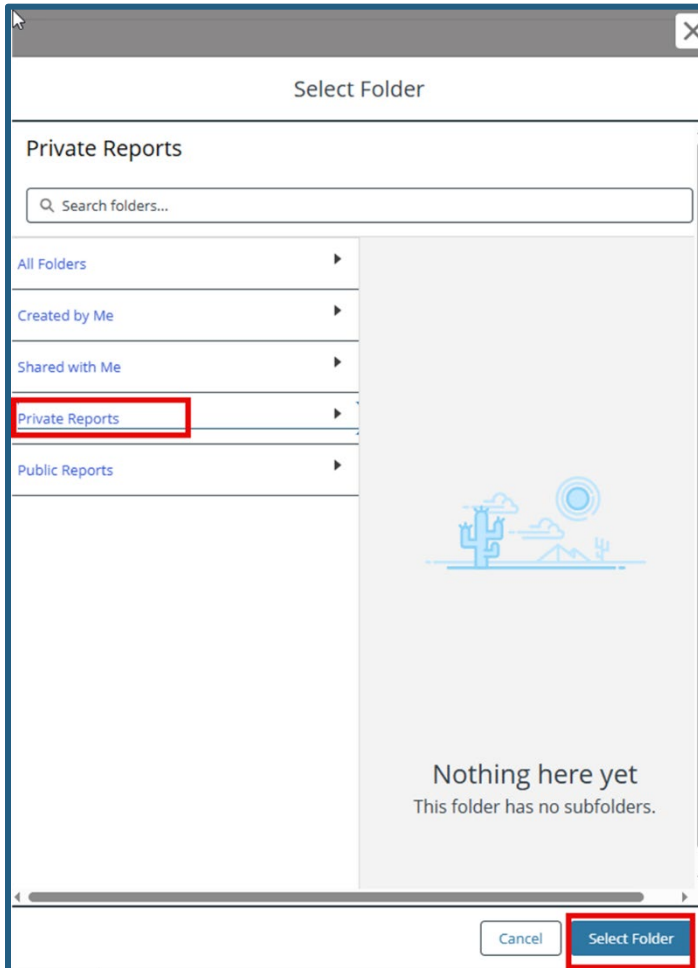
Nothing here yet
This folder has no subfolders.

Nothing here yet
This folder has no subfolders.

Cancel Select Folder

7. Select **Private Reports** of the available folders and click **Select Folder**.

Note: This is the only folder that is allowed to save a customized report for enrollers.



The customized report will now be available to the Enroller under *Private Reports*.

