



Book of Business Export Job Aid Agency Managers

Overview

Agency Managers are now able to access an aggregate Agency Book of Business from their CalHEERS Agency portal. They also have access to export their own Book of Business, as well as a Book of Business for an individual agent in the agency roster.

The Book of Business reflects consumer data from the week prior on Friday at 9 p.m.. Any changes made after 9 p.m. on Friday, the change will not be reflected until the following Friday between 9 p.m. and midnight.

The Book of Business is provided as an Excel document, which allows you the flexibility to sort, manipulate and maintain client data. The Book of Business contains Covered California, Mixed Household, and Medi-Cal members.

Please note: using the filters on the Active Consumer list does not populate the results of the exported Book of Business. All consumers delegated to either the Agent or the Agency will populate in the export.

Personally Identifiable Information (PII)

PII is found within the Book of Business export and must remain secure and confidential in accordance with Covered California's Security and Privacy policies as outlined in the [Agent 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.

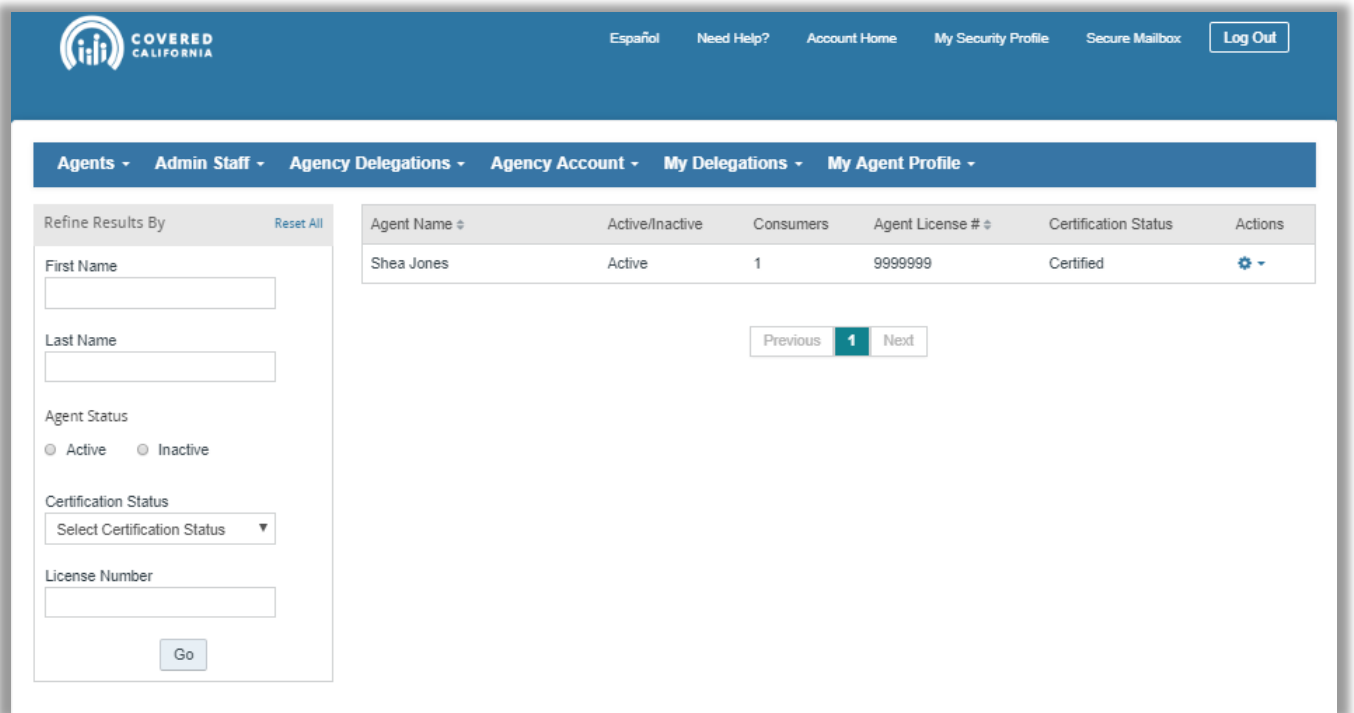
The Book of Business is provided as an Excel document, which allows you the flexibility to sort, manipulate and maintain client data. The Book of Business contains Covered California, Mixed Household and Medi-Cal members.

This Job Aid is designed to walk you through the steps to obtain your Agency files.

-See Step-by-Step Instructions Below-

Agency Managers:

1. Log into your CalHEERS Agency Portal and you land on this homepage.



The screenshot shows the CalHEERS Agency Portal homepage. At the top, there is a blue navigation bar with the Covered California logo and links for "Español", "Need Help?", "Account Home", "My Security Profile", "Secure Mailbox", and "Log Out". Below this is a secondary navigation bar with dropdown menus for "Agents", "Admin Staff", "Agency Delegations", "Agency Account", "My Delegations", and "My Agent Profile".

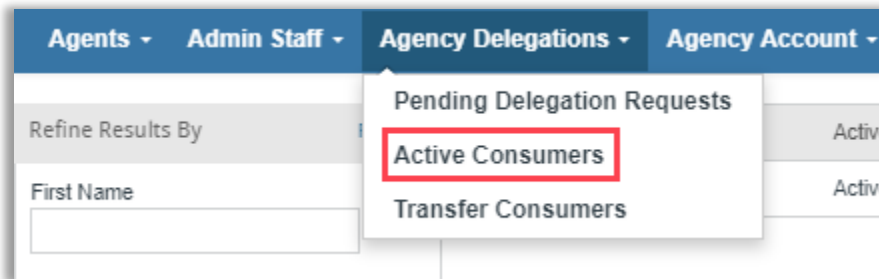
On the left side, there is a "Refine Results By" section with a "Reset All" link. It contains input fields for "First Name" and "Last Name", radio buttons for "Agent Status" (Active and Inactive), a "Certification Status" dropdown menu, and a "License Number" input field. A "Go" button is located at the bottom of this section.

The main content area displays a table of agents:

Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Shea Jones	Active	1	9999999	Certified	

Below the table, there are "Previous", "1", and "Next" navigation buttons.

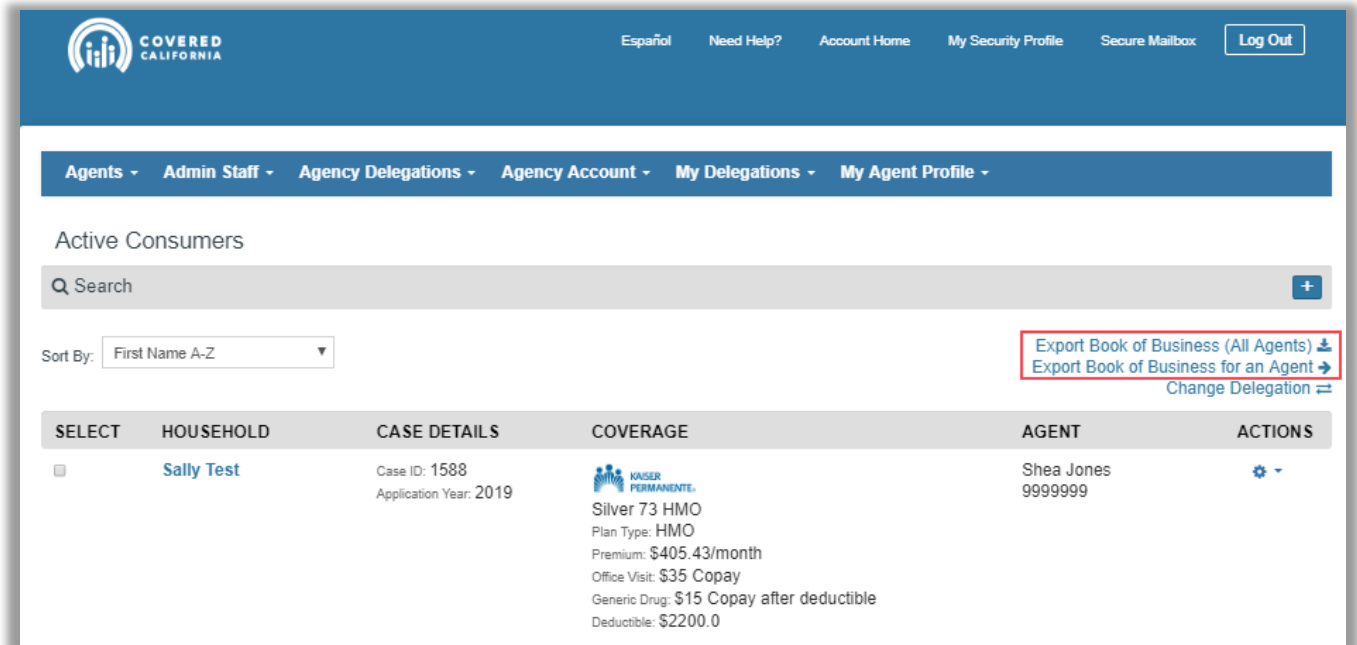
2. From the "Agency Delegations" drop down menu, select "Active Consumers."



This screenshot shows a close-up of the "Agency Delegations" dropdown menu. The menu is open, displaying three options: "Pending Delegation Requests", "Active Consumers", and "Transfer Consumers". The "Active Consumers" option is highlighted with a red rectangular box.

3. On the “Active Consumer” page, there are two options for Book of Business Export:




- [Export Book of Business \(All Agents\)](#)
- [Export Book of Business for an Agent](#)





Active Consumers

Q Search +

Sort By: First Name A-Z

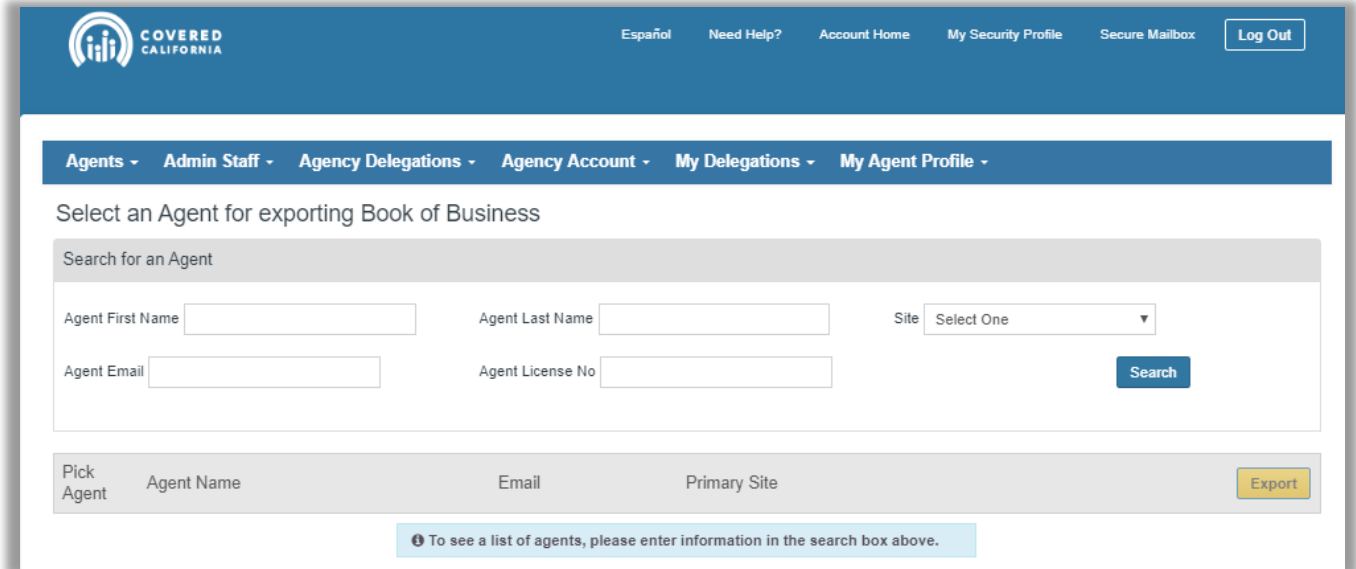
[Export Book of Business \(All Agents\)](#) 
[Export Book of Business for an Agent](#) 
[Change Delegation](#) 

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>	Sally Test	Case ID: 1588 Application Year: 2019	 Silver 73 HMO Plan Type: HMO Premium: \$405.43/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$2200.0	Shea Jones 9999999	

4. To Export a Book of Business for your entire Agency, select “Export Book of Business (All Agents).” This will export an excel file with all consumer data for your Agency.

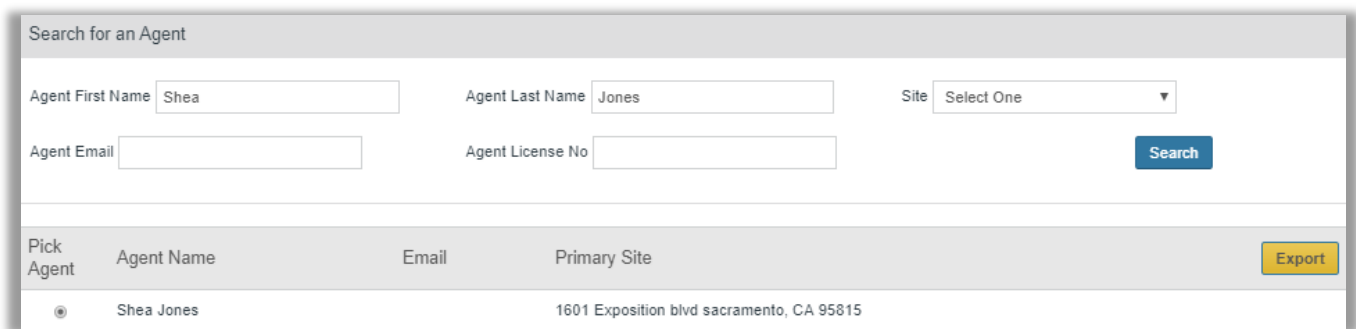
Please Note: Column “AV” displays each consumer’s delegated Agent from your Agency. You can use this as a sort criteria, if needed.

- To export a Book of Business for a specific Agent within your Agency, select the “Export Book of Business for an Agent” link. You will be navigated to to the “Select an Agent for exporting Book of Business” page.



- Here you must enter complete information into the search field/s of your choosing. DO NOT type partial info as the results will not display.

- i.e. Do not enter “Tim” for Timothy, if you are looking for Timothy – you must enter the entire first name

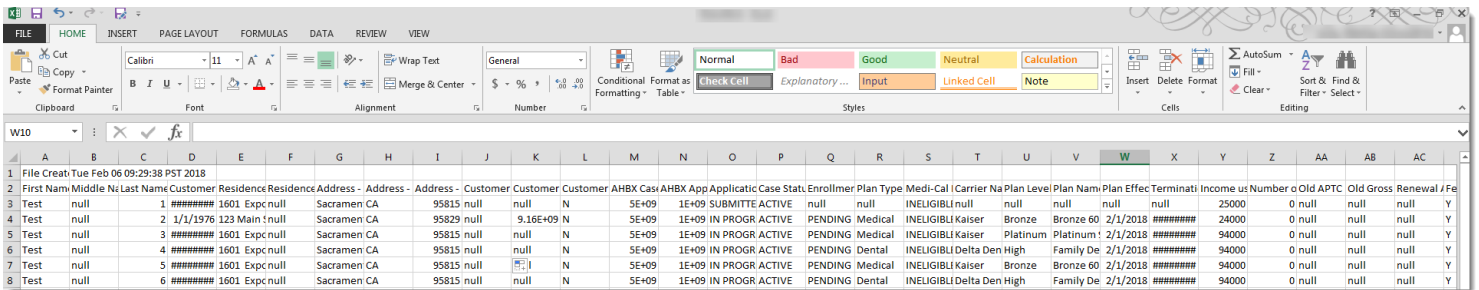


Pick Agent	Agent Name	Email	Primary Site	Export
<input checked="" type="radio"/>	Shea Jones		1601 Exposition blvd sacramento, CA 95815	

- After searching for the Agent you wish to export a Book of Business, select the radio button next to the name and select the "Export" button on the right side of the page.

Pick Agent	Agent Name	Email	Primary Site	Export
<input checked="" type="radio"/>	Shea Jones		1601 Exposition blvd sacramento, CA 95815	

- The Book of Business will export in an excel file with only the consumer data for the Agent specified and you are able to view, sort, and view enrollment data, consumer data, Med-Cal information, etc. for the consumers.



File	Home	Insert	Page Layout	Formulas	Data	Review	View																								
W10	Calibri 11	Wrap Text	General	Normal	Bad	Good	Neutral	Calculation	AutoSum	Sort & Find & Filter																					
1	File Created	Tue Feb 06 09:29:38 PST 2018																													
2	First Name	Middle Name	Last Name	Customer Residence	Residence Address -	Address -	Address -	Customer	Customer	Customer	AHBX Case	AHBX App	Applicative	Case Status	Enrollment	Plan Type	Medi-Cal	Carrier Na	Plan Level	Plan Name	Plan Effect	Termination	Income us	Number o	Old APTC	Old Gross	Renewal / Fe				
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5	Test	null	3	#####	1601	Exp	null	Sacramen	CA	95815	null	null	N	SE+09	1E+09	IN PROGR	ACTIVE	PENDING	Medical	INELIGIBL	Kaiser	Platinum	Platinum !	2/1/2018	#####	94000	0	null	null	null	Y
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Understanding the Book of Business Report

The [Book of Business Description Chart](#) provides a description of the fields found within the Book of Business.

Please note: If the information is not applicable or not provided, the data under each column will be blank.