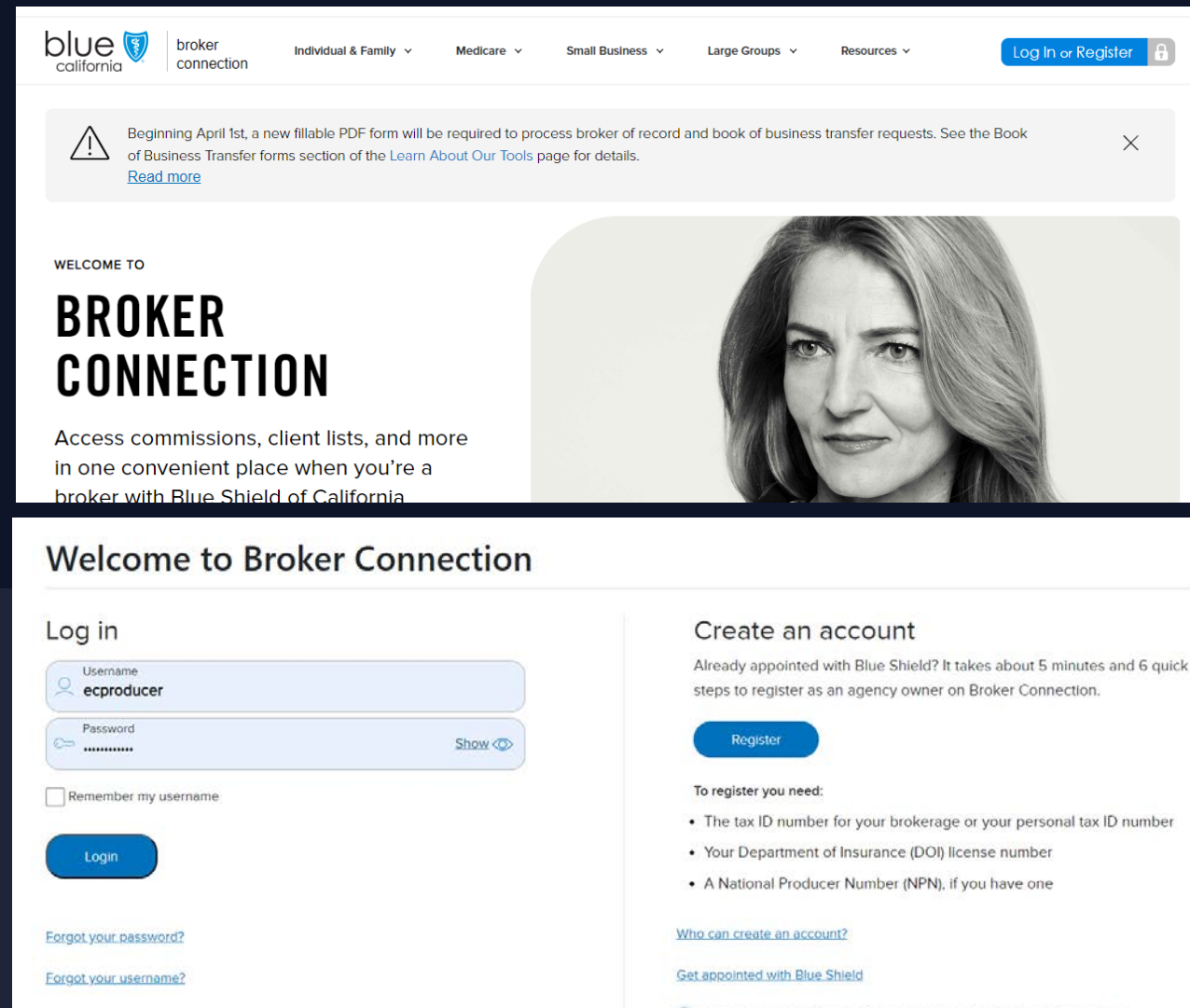


Employer Enrollment Tool Broker Reports

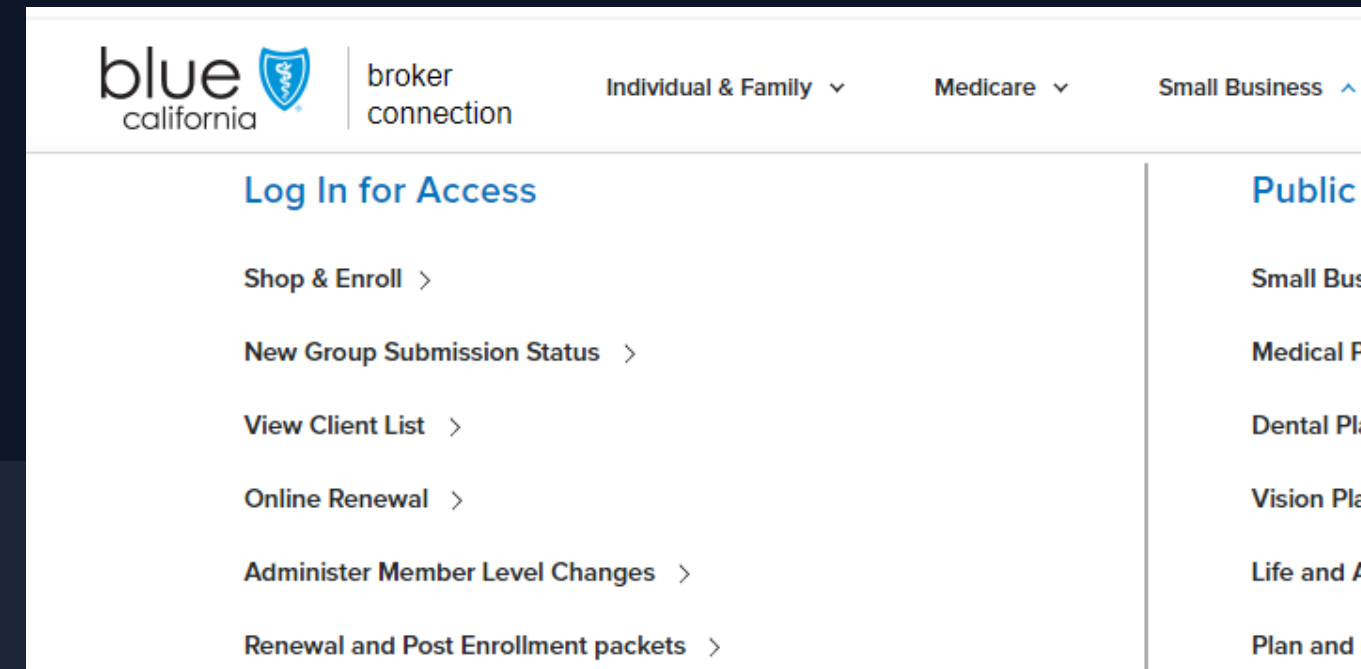
Last updated June 1, 2023

Navigate to the tool



Log into Broker Connection

Use the links on the log in page to reset your password



Click on the administer member level changes link

The link will route you to the Employer Enrollment Tool

Homepage

Along the top:

- Search bar allows the user to search records they have permission to view, including quotes and enrollments.
- Home returns the user to the Employer Enrollment Tool home page.
- My Groups displays the company account.
- My Reports gives you access to run and export reports for your book of business or individual clients
- Resources links the broker to User Guide, Tips and Tricks, and a tool resource page with additional information.

Quick Actions:

- Manage all groups displays the groups owned by the logged in user and the agency book of business. To submit a group or member record change from the home or landing page, click on the button Manage All Groups.

Employer tool support (800) 325-5166

blue of california

Search...

House Broker

HOME MY GROUPS MY REPORTS RESOURCES

Welcome House Broker!

New Enrollment View Small Group Enrollments Quote a Small Group View Small Group Quotes Manage All Groups

Enrollment Progress

To Do

View More

Not yet started	In Progress, not submitted	Submitted, requires broker action
10/1/2022 Effective: 3	11/1/2022 Effective: 124	10/1/2022 Effective: 46
11/1/2022 Effective: 19	12/1/2022 Effective: 21	11/1/2022 Effective: 60
12/1/2022 Effective: 2	1/1/2023 Effective: 72	12/1/2022 Effective: 24
1/1/2023 Effective: 8	2/1/2023 Effective: 1	1/1/2023 Effective: 33

Submitted Pending UW Approved BSC Finalizing Enrolled

Prior report name	EET report name	Report description
n/a	Contracts with quotes	Enrolled groups with an EET quote
n/a	Book of business this calendar year	Groups enrolled this year
n/a	Terminated groups this calendar year	Groups canceled this year
Benefits refused/ cancellation	Applicants refusing coverage	Roster of refusals of coverage
Benefit summary	Benefit plans	All plans sold throughout your book of business
Group information	Class and waiting period audit report	Group waiting periods for each class offered
COBRA summary	COBRA/Cal COBRA summary	Roster of members enrolled in COBRA or Cal COBRA this year
n/a	Dependents created last week	Roster of new dependents added last week
Hired employees	Subscribers created last week	Roster of new subscribers added last week
n/a	Census members last week	Roster of new members added last week
n/a	My completed maintenances	All complete and installed tool submissions across your book of business
Terminated employees	My group and member cancelations	All cancelation submissions at the group and member levels
Employee census	Member census	Member roster with plan enrollment information
Employee detail report	Member detail report	Member demographic and plan enrollment information
Dependent census	Child dependent census	Child dependent only roster with plan enrollment information
n/a	Aging out dependents	Roster of dependents age 25 + who will age out in your book of business

My Reports

Report folder

Reports
All Folders
2 items

REPORTS	Name	Created By	Created On	Last Modified By
Recent	Producer Reports Folder	Jeremy Carlson	1/9/2023, 5:09 PM	Jeremy Carlson
Created by Me	SG Broker Portal	Jeremy Carlson	4/28/2020, 12:56 PM	Jeremy Carlson

Private Reports
All Reports

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

To access reports, click My Reports and then All Folders in the left-hand panel.

Report folder

blue of california

Search...

House Broker

HOME MY GROUPS MY REPORTS RESOURCES

Reports

All Folders > Producer Reports Folder

16 items

Search all folders... New Report

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	Contracts with Quotes		Producer Reports Folde	Jeremy Carlson	2/7/2023, 2:34 PM	
Created by Me	Book of Business This Calendar Year		Producer Reports Folde	Jeremy Carlson	3/31/2023, 4:28 PM	
Private Reports	Terminated Groups This Year		Producer Reports Folde	Jeremy Carlson	3/31/2023, 4:56 PM	
All Reports	Applicants Refusing Coverage		Producer Reports Folde	Jeremy Carlson	3/31/2023, 5:08 PM	
FOLDERS	Cobra/CalCobra Summary		Producer Reports Folde	Jeremy Carlson	4/2/2023, 4:32 PM	
Created by Me	Dependents Created Last Week		Producer Reports Folde	Jeremy Carlson	2/6/2023, 12:18 PM	
Shared with Me	Subscribers Created Last Week		Producer Reports Folde	Jeremy Carlson	4/3/2023, 5:54 PM	
FAVORITES	Census Members Last Week		Producer Reports Folde	Jeremy Carlson	2/3/2023, 9:28 PM	
All Favorites						

Next, select the report from the available list.

Editing reports

Report: Census with Census Member Plans
Member Census

Enable Field Editing

This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records
24,377

Group: Account Name	Subscriber Id	Name	Applicant Type	Group Census Member Plan Name	Plan Effective Date	SubGroup ID
A.L. GILBERT COMPANY (412)	53000179D (1)	ALAN S WELCH	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
Subtotal						
	53000208D (5)	JOSEPH O ROCHA	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		CHRISTINA ROCHA	Spouse	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		BRAYDEN ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		GRAYSON ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		CARTER ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
Subtotal						
	53000217D (2)	OSCAR PONCE	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		MARIA ALBA DE PONCE	Spouse	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
Subtotal						
	53000455D (2)	FERNANDO S ORTEGA	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		YELILA ORTEGA	Spouse	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
Subtotal						

Row Counts Detail Rows Subtotals Grand Total

Filters

- Show Me: All census
- Effective Date: All Time
- Group: Account Name contains ""
- Type equals System

Report: Census with Census Member Plans
Member Census

Enable Field Editing

This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records
24,377

Group: Account Name	Subscriber Id	Name	Applicant Type	Group Census Member Plan	Plan Effective Date	SubGroup ID
A.L. GILBERT COMPANY (412)	53000179D (1)	ALAN S WELCH	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
Subtotal						
	53000208D (5)	JOSEPH O ROCHA	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		CHRISTINA ROCHA	Spouse	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		BRAYDEN ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		GRAYSON ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		CARTER ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
Subtotal						
	53000217D (2)	OSCAR PONCE	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		MARIA ALBA DE PONCE	Spouse	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
Subtotal						
	53000455D (2)	FERNANDO S ORTEGA	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		YELILA ORTEGA	Spouse	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
Subtotal						

Row Counts Detail Rows Subtotals Grand Total

Filter by Group: Account Name

Operator: contains

Value: bg

Use relative value

Cancel Apply

Filters

- Show Me: All census
- Effective Date: All Time
- Group: Account Name contains ""
- Type equals System

Use the funnel icon to edit the report filters.

To filter for a specific group, click on the Group: Account Name filter and type in the group's name.

To filter a time period, click on Date filter and select the time period.

Export reports

Report: Census with Census Member Plans
Member Census

⚠ This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records
24,377

<input type="checkbox"/> Group: Account Name ↑ ▾	<input type="checkbox"/> Subscriber Id ↑ ▾	<input type="checkbox"/> Name ▾	<input type="checkbox"/> Applicant Type ▾	<input type="checkbox"/> Group Census Member Plan Name ▾	<input type="checkbox"/> Plan Effective Date ▾	<input type="checkbox"/> SubGroup ID
<input type="checkbox"/> A.L. GILBERT COMPANY (412)	53000179D (1)	ALAN S WELCH	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
	Subtotal					
	53000208D (5)	JOSEPH O ROCHA	Subscriber	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		CHRISTINA ROCHA	Spouse	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000
		BRAYDEN ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company CI24	1/1/2023	1000

Filters

- Show Me All census
- Effective Date All Time
- Group: Account Name contains ""
- Type equals System

Enable Field Editing | Add Chart | Edit ▾

Save As | Export

Use the down arrow to export the report into an Excel document.

Support

Access additional tool resources on Employer Connection's [resource page](#)

Additional resources for enrollment and eligibility support:

- [2023 Admin Guide](#)
- [Employer Connection Quick Start Guide](#)
- [Employer Connection Reference Library](#)

Need to talk to someone?

[Sales Account contact list](#)

Small Group Employer Services (800) 325 - 5166

Core Group Employer Services (855) 747 - 5809

Trouble logging in? Use the username and password reset links on the login page for immediate login assistance