



LISI CARRIERS' BROKER PORTALS & CENSUS EXPORT

Carriers may offer the ability to download census information from their broker portal websites. If available, you'll find instructions below on how to export the census information from each carrier's portal.

| CARRIER | BROKER PORTAL INSTRUCTION |
|---------------------------|--|
| Aetna | <p>ACA census information is available through the Aetna broker portal:</p> <ul style="list-style-type: none"> • Log into the broker portal and click on "Current Business" (top menu). • Click on "Small Group" (top menu). • Click on "eBusiness" under Quoting, Underwriting, Enrollment & Billing section. • Search for the company then click on the company name. • Click "View Employees" in the Enrollment Summary section. • Click "Standard Reports" then "Census". Select either the Employee Census or Dependent Census option. • Select "Excel Compatible (CSV)" from the Report Format drop down then click "Create Report". • Wait a few seconds then click the "Refresh Pending" button. Once available, click "Download" to open the census. <p><i>Aetna broker portal URL: https://www.aetna.com/producer_public/login.fcc?</i></p> |
| Anthem Blue Cross | <p>ACA census information is available through the Anthem broker portal:</p> <ul style="list-style-type: none"> • Log into the broker portal and click on "Current Business" (top menu). • Click on "Rate Actions & Renewals" (sub-menu). • Search for your group then click on the group name. • Click on "Edit Census". • Click on "Download Census". <p><i>Anthem broker portal URL: https://brokerportal.anthem.com/ehb/web/bkr/acc/login.htm?</i></p> |
| Blue Shield | <p>ACA census information is available through the Blue Shield broker and employer portal:</p> <ul style="list-style-type: none"> • Log into the broker portal. • Select the group name using the drop-down menu. • Click on "View Member Roster" under Your Members and Plans. • Select "Subscriber Only" or "Subscribers and Dependents". • Under View Only the default setting is ALL SubGroups, Status, and Plans. Use the drop-down menu to define your census list. • On the right, above the member records, change the page setting to 100/page. • Above the page setting are Print and Export icons. Click the Export icon to export the census to Excel. <p><i>Blue Shield broker portal URL: https://www.blueshieldca.com/bsca/bsc/wcm/connect/employer/employer_contents_en/home/</i></p> |
| CaliforniaChoice® | Broker portal is not available. Brokers must request this information from CalChoice account management team. |
| Covered CA for SB | Currently census functionality, including an export feature, is not available. |
| Health Net | <p>ACA census information is available through the Health Net broker portal:</p> <ul style="list-style-type: none"> • Log into the broker portal and click on "Book of Business & Commission Statements" (top of the page). • Click on the group you want to view. • From the group details page, click "Download Subscriber List as an Excel Sheet" shown below "View Subscriber List" (upper left corner). <p><i>Info is for subscriber data; if you require dependent information please contact Health Net member services.</i></p> <p><i>Health Net broker portal URL: https://www.healthnet.com/portal/broker/home.ndo</i></p> |
| Kaiser Permanente | Census information is not available through the broker portal. Employers may download via the employer portal. |
| Sharp Health Plan | Brokers will only have access to download census information if the employer has authorized them to do so. Otherwise, brokers must request this information from the employer or contact Sharp's account management team. |
| Sutter Health Plus | Currently an export feature is not available. |
| UnitedHealthcare | Currently an export feature is not available. |

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