



Book of Business Export Job Aid Agents

Overview

Agents are able to access their Book of Business from their CalHEERS Agent portal.

The Book of Business reflects consumer data from the week prior on Friday at 9:00 p.m. Any changes made after 9:00 p.m. on Friday, the change will not be reflected until the following Friday between 9:00 p.m. and midnight.

The Book of Business is provided as an Excel document, which allows Agents 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 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.

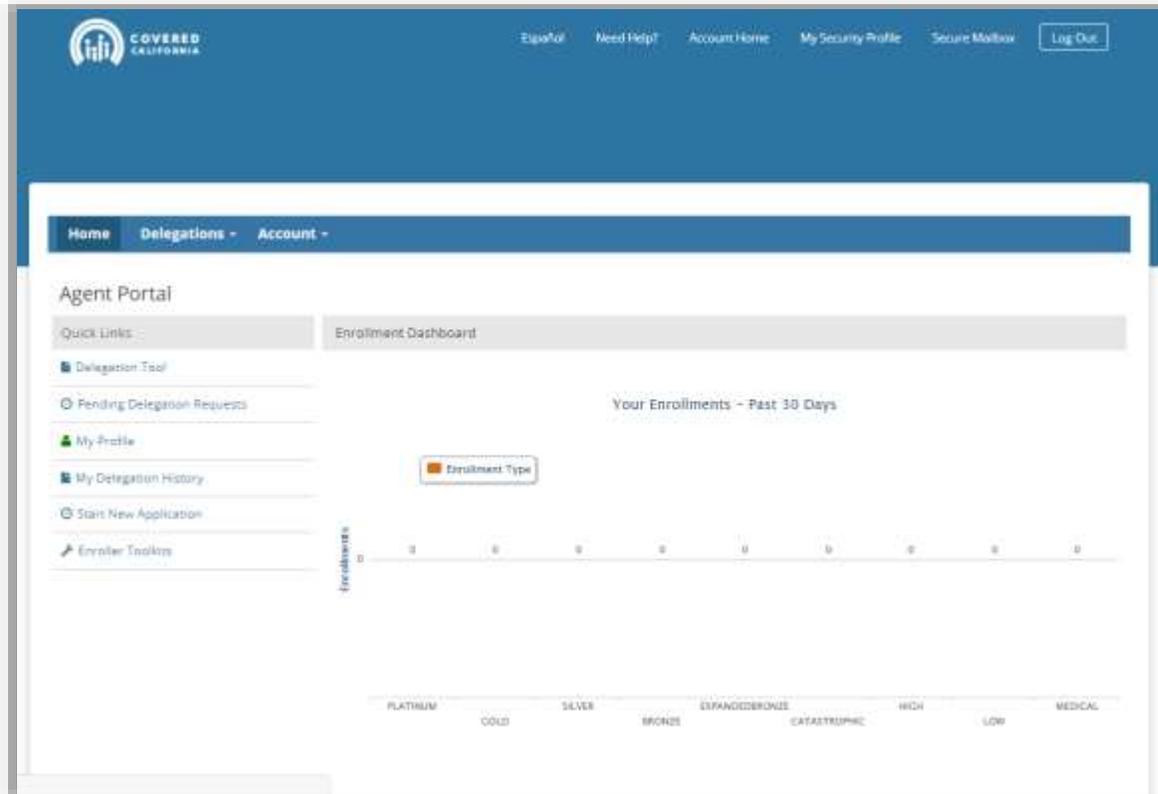
The Book of Business is provided as an Excel document, which allows you the flexibility to sort, manipulate and maintain client data. The Book of Business contains Covered California, Mixed Household and Medi-Cal members.

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

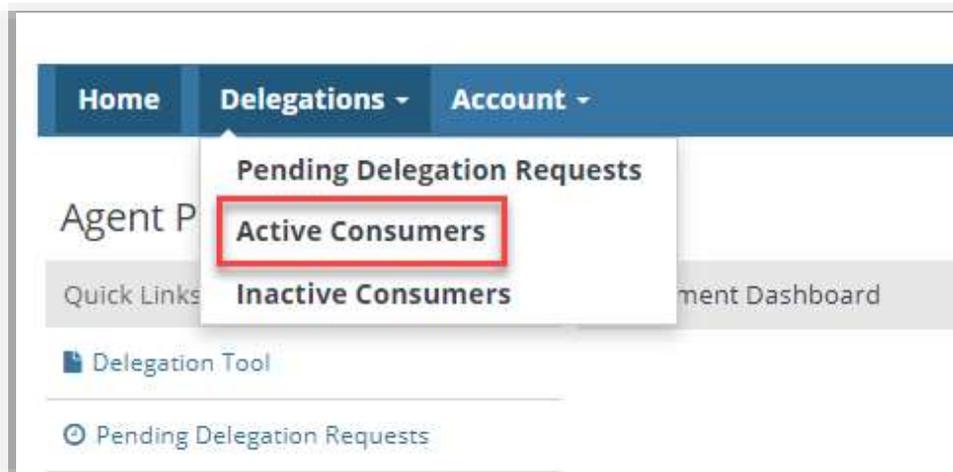
-See Step-by-Step Instructions Below-

Agents:

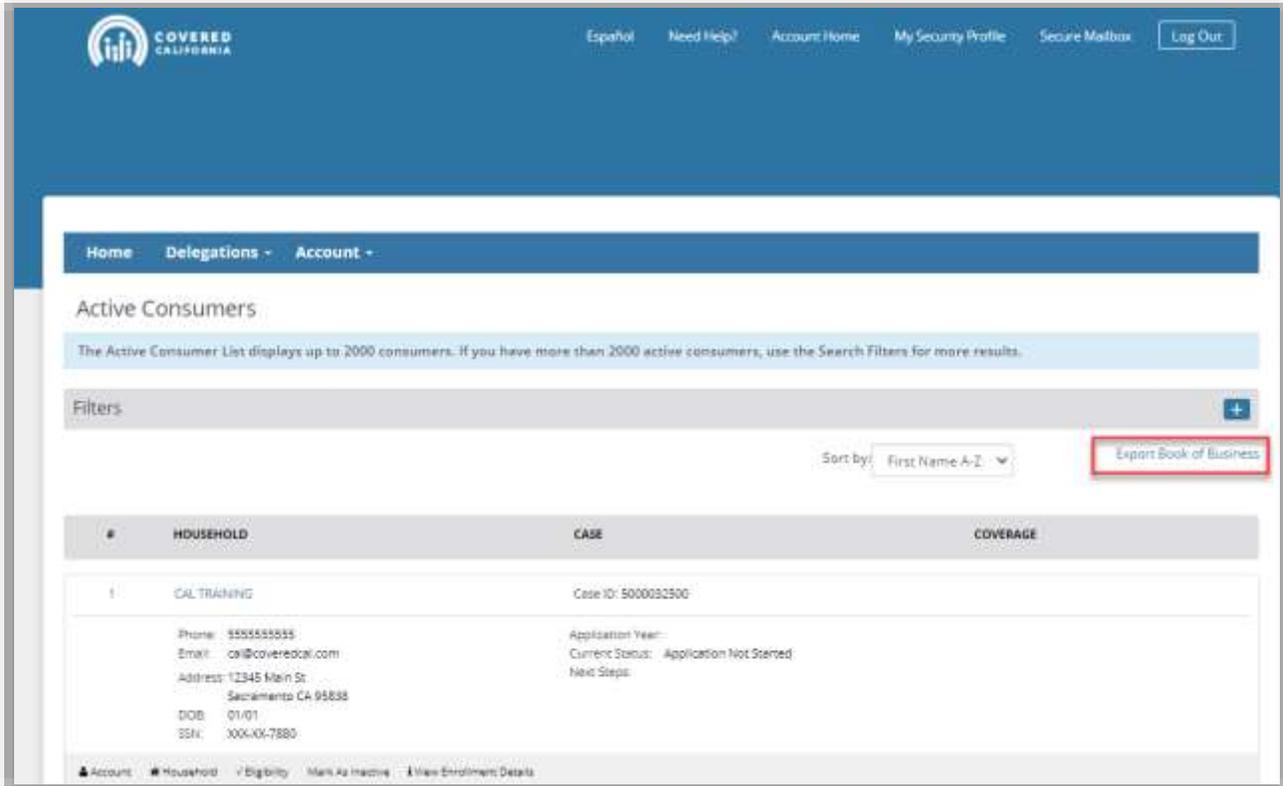
1. Log into your CalHEERS Agency Portal and you land on this homepage.



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



3. On the “Active Consumer” page, select the option for Book of Business Export:
 - Export Book of Business



4. To Export a Book of Business, select “Export Book of Business”. This will export an excel file with all consumer data.
 - Select “Yes,” for the disclaimer.





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- 5. The Book of Business will export in an excel file with only the consumer data for the Agent 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	Help
1	File	Home	Insert	Page Layout	Formulas	Review	Help
2	File	Home	Insert	Page Layout	Formulas	Review	Help
3	File	Home	Insert	Page Layout	Formulas	Review	Help
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6	File	Home	Insert	Page Layout	Formulas	Review	Help
7	File	Home	Insert	Page Layout	Formulas	Review	Help
8	File	Home	Insert	Page Layout	Formulas	Review	Help

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.