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Broker Services Portal (BSP) Quick Guide

How to access Individual & Family Block of Business

- 1. On the left menu bar, click **Individual & Family Brokers.**
- 2. Click a **Broker Name** with the green list icon on their line to view the block of business. *Image 2*



✓ FIRST LAST	
✓ FIRST LAST	
✓ FIRST LAST	
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How to access Individual & Family Block of Business

- 3. Sort by:
 - Client first name
 - Client last name
 - Plan
 - Coverage start date (sort and filter) Image 3
- 4. Click the green list icon next to the broker's name to download their block of business. *Image 4*

Billing	Broker Test Co	mpany, XXX-XX-C						
o Banking	A First Last							
Benefits	ID Number	Client First Name	Client Last Name	Coverage Start Date	Plan	Coverage Type	Members	Premium
Reports				06/01/2024	Individual and Family Plan A	Subscriber Only	1	\$54.69
	000000001	FIRST	LAST	01/01/2021	Individual and Family Elite 3500 Individual and Family Elite 3500 plus Vision	Subscriber Only Family	1	\$70.49 \$464.58
0	000000003	FIRST	LAST	12/01/2021	Individual and Family Elite 3500	Subscriber Spouse	2	\$140.98
Brokers	000000004	FIRST	LAST	02/01/2021	Individual and Family Elite 3500	Subscriber Only Subscriber Only	1	\$70.49
2	00000006	FIRST	LAST	01/01/2022	Individual and Family Elite 3500	Subscriber and 2+ Child	3	\$211.47
amily Brokers	000000007	FIRST	LAST	01/01/2023	Individual and Family Plan A	Subscriber Only	1	\$54.69
	00000008	FIRST	LAST	02/01/2021	Individual and Family Elite 3500 plus Vision	Subscriber Spouse	2	\$154.86
	00000009	FIRST	LAST	01/01/2021	Individual and Family Elite 3500	Subscriber Only	1	\$70.49
	Items per page	- 10 -				1 - 10 of 17		> >

ID Number	Client First Name	Client Last Name	Coverage Start Date	Plan	Coverage Type Ex (C:	port Full Deta SV/EXCEL)	ül
0000001	FIRST	LAST	01/01/2023	Individual and Family Plan A	Subscriber Only	1	\$54.6
0000002	FIRST	LAST	11/01/2023	Individual and Family Plan D plus Vision	Subscriber Only	1	\$68.9
0000003	FIRST	LAST	02/01/2021	Individual and Family Elite 3500	Subscriber Only	1	\$70.4
0000004	FIRST	LAST	12/01/2021	Individual and Family Elite 3500	Subscriber Spouse	2	\$140
0000005	FIRST	LAST	11/01/2022	Individual and Family Elite 3500 plus Vision	Subscriber Only	1	\$77.4
0000006	FIRST	LAST	06/01/2024	Individual and Family Plan A	Subscriber Only	1	\$54.6
0000007	FIRST	LAST	01/01/2021	Individual and Family Elite 3500	Subscriber Only	1	\$70.4
0000008	FIRST	LAST	07/01/2021	Individual and Family Elite 1000	Subscriber Only	1	\$36.0
0000009	FIRST	LAST	02/01/2023	Individual and Family Plan A	Subscriber and 2+ Child	3	\$197.
0000010	FIRST	LAST	10/01/2019	Individual and Family Elite 3500 plus Vision	Family	6	\$464