


- ▶ Login:
blueshieldca.com/bsca/bsc/wcm/connect/broker/broker_content_unauth_en/broker/homepage
- ▶ Enter your Username and Password and click Login

Welcome to Broker Connection

Log in

[Show](#) 

Remember my username

[Login](#)

[Forgot your password?](#)

[Forgot your username?](#)

Create an account

A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process.](#)

[Register](#)

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

- ▶ Select **"Small Business"** or **"Large Business"** then Select **"Administer Member Level Changes"**



broker connection

Individual & Family ▾

Medicare ▾

Small Business ▲

Large Groups ▾

Resources ▾

SMALL BUSINESS

[Shop & Enroll >](#)

[New Group Submission Status >](#)

[View Client List >](#)

[Online Renewal >](#)

[Administer Member Level Changes >](#)

[Renewal and Post Enrollment packets >](#)

[Small Business Home >](#)

[Medical Plans >](#)

[Dental Plans >](#)

[Vision Plans >](#)

[Life and AD&D Plans >](#)

[Plan and network comparison tools >](#)

- ▶ Select **"My Reports"** then click go, in the middle of the page



HOME

MY GROUPS

MY REPORTS

RESOURCES ▾

- ▶ In the search box on the right, Type **"Member Details"** and select **"Member Details Report"**,

HOME MY GROUPS MY REPORTS RESOURCES ▾

Reports

Recent

1 item

New Report

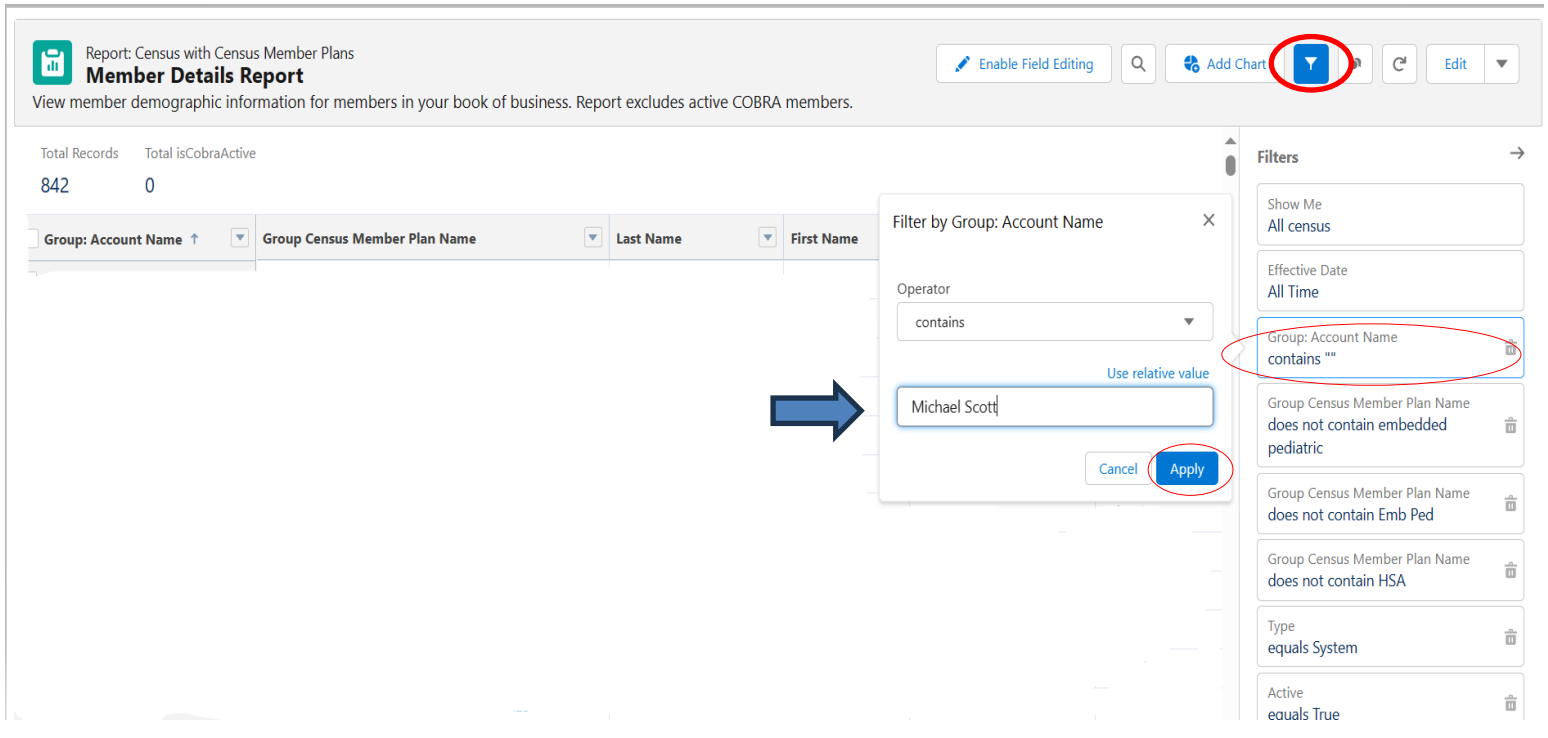


REPORTS	Report Name	Description ▾	Folder	Created By	Created On ▾	Subscribed	
Recent							
Created by Me	Member Details Report	View member demographic information for members in your book of business. Report excludes active COBRA members.	Producer Reports Folder	Jeremy Carlson	4/25/2023, 2:43 PM		▾
Private Reports							
All Reports							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

Note: If the report is not visible, Blue Shield Account Management can grant you access. Reach out to the CW team for further guidance.

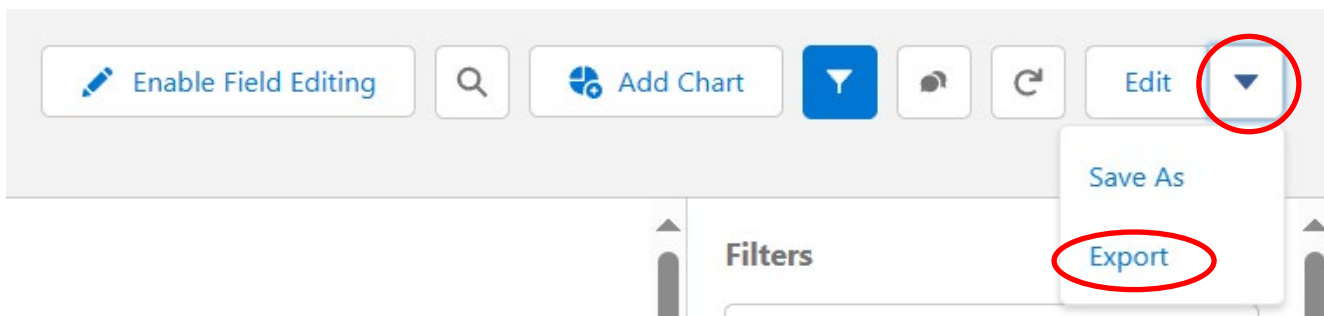
- ▶ Click on the **"Filter"** button and Select **"Group: Account Name"**

Dialogue box appears (**Filter by Group: Account Name**) Type in few letters of the company you want to audit and select "apply"



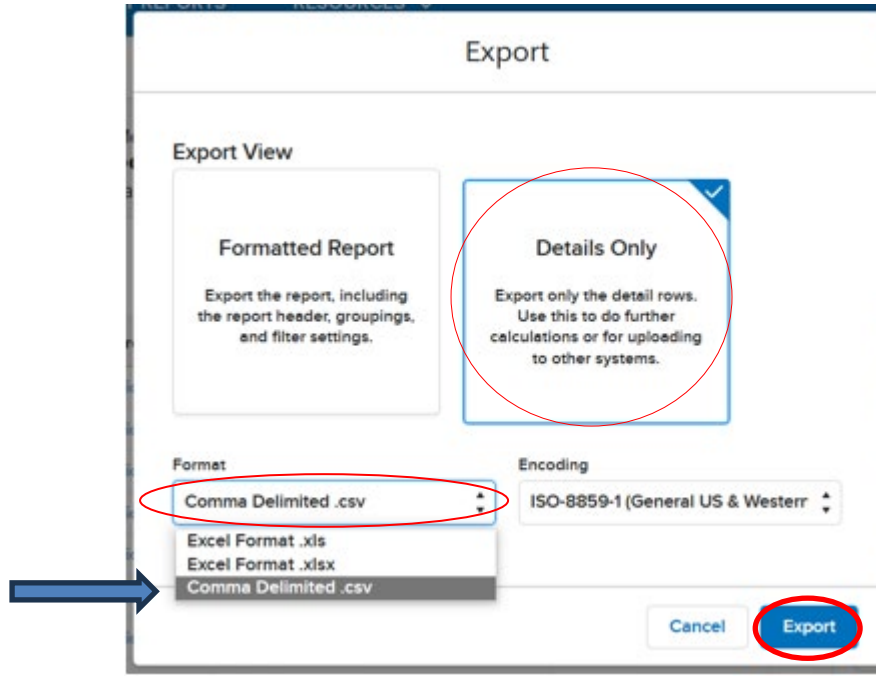
The screenshot shows the 'Member Details Report' interface. At the top right, there is a toolbar with buttons for 'Enable Field Editing', search, 'Add Chart', a filter icon (circled in red), a refresh icon, and an 'Edit' dropdown. Below the toolbar, the report title 'Member Details Report' and a subtitle 'View member demographic information for members in your book of business. Report excludes active COBRA members.' are displayed. The main area shows a table with columns for 'Group: Account Name', 'Group Census Member Plan Name', 'Last Name', and 'First Name'. A dialog box titled 'Filter by Group: Account Name' is open, showing an operator dropdown set to 'contains' and a text input field containing 'Michael Scott'. The 'Apply' button in the dialog is circled in red. To the right, a 'Filters' panel is visible, listing various filter criteria, with the first one, 'Group: Account Name contains ""', circled in red. A blue arrow points from the dialog box towards the table.

- ▶ Once the company appears, Click on down arrow, select **"Export"**



This close-up screenshot focuses on the toolbar. The 'Edit' dropdown menu is open, showing options for 'Save As' and 'Export'. Both the dropdown arrow and the 'Export' option are circled in red.

- ▶ Dialogue box appears (Export) select "**Details Only**" and in the drop-down menu select "**Comma Delimited.csv**" and select the "**Export**" Button.



- ▶ Open the file that states, "**report###(Excel)**". Once the file is downloaded. Upload the .CSV file to Coverage Wizard!