


- ▶ Login to your **Ease** Portal.
- ▶ Once logged in, Click on “**Companies**” and select the company you want to audit.

 **Companies**

- ▶ Once you are in the company’s profile, select “**Benefits**”.
- ▶ Under the Carrier tab, only select the carrier you want to audit. For this example, drop “**Blue Shield of CA**”

Status	Available	Type	All	Carrier	Blue Shield of ...
<input type="checkbox"/>	Name			Carrier	
<input type="checkbox"/>	2023-Gold Full PPO 750/30 OffEx			Blue Shield of CA	
	2 Forms				
<input type="checkbox"/>	2023-Gold Tandem PPO 750/30 OffEx			Blue Shield of CA	

Carrier dropdown menu options: All, Anthem, **Blue Shield of CA**, Guardian

- ▶ Once carrier plans appear, hit the **“checkbox”** next to the name and select all the carrier plans

Profile Employees **Benefits** Documents ACA EaseHR Payroll Logins Marketplace Settings

Plans Progress Open Enrollment Lock Enrollment Statements Instructions Rate Quoting Partners

Status Available ▾ Type All ▾ Carrier Blue Shield of ... ▾ Reports ▾ Actions ▾

<input checked="" type="checkbox"/>	Name	Type	Carrier	Effective	Import Id
<input checked="" type="checkbox"/>	2023-Gold Full PPO 750/30 OffEx 2 Forms	Medical	Blue Shield of CA	12/1/2023	M5NRTM
<input checked="" type="checkbox"/>	2023-Gold Tandem PPO 750/30 OffEx 2 Forms	Medical	Blue Shield of CA	12/1/2023	76AXF5
<input checked="" type="checkbox"/>	2023-Platinum Access+ HMO 0/30 OffEx 2 Forms	Medical	Blue Shield of CA	12/1/2023	Q3Q3WG
<input checked="" type="checkbox"/>	2023-Silver Full PPO 2550/70 OffEx 2 Forms	Medical	Blue Shield of CA	12/1/2023	BAJFKL
<input checked="" type="checkbox"/>	2023-Silver Tandem PPO 2550/70 OffEx 2 Forms	Medical	Blue Shield of CA	12/1/2023	RDHVCZ

- ▶ Once the plans are selected, select **“Reports”** and **“Enrollment Census”** from the dropdown to create an enrollment report.

Status Available ▾ Type All ▾ Carrier Blue Shield of ... ▾ Reports ▾ Actions ▾

<input checked="" type="checkbox"/>	Name	Type	Carrier	Effective	Import Id
<input checked="" type="checkbox"/>	2023-Gold Full PPO 750/30 OffEx 2 Forms	Medical	Blue	23	M5NRTM
	2023-Gold Tandem PPO 750/30 OffEx				

Enrollment Census

Carrier Census

Annual Benefits Contribution

Consolidated Billing

- ▶ Once you the “**Enrollment Census**” is selected the Dialogue box appears (Customize Report). Change the layout to “**Vertical**”, Include dependents “**Yes**” and employee status to “**Active**”, leave everything else blank. Select “**Generate**” to run the report.

Customize Report Close

Layout
Vertical ▼

Include Dependents *
Yes ▼

Employee Statuses
Active ▼

Employee Types
All Types ▼

Election Statuses
All Election Statuses ▼

Generate

Report is being generated

Your report is running and can be found in the 'Generated' Tab under Reports when it has finished processing.

OK

- ▶ Click on the company report to “Download”
Upload the .CSV file to Coverage Wizard!

[Home](#)[To-Dos](#)[Companies](#)[Reports](#)[Libraries](#)[Marketing](#)

Reports

[Generated](#)[Available](#)[Custom](#)[Feedback](#)

Name

Date

Status

[Michael Scott Paper Co. - Enrollment Census \(Horizontal\).csv](#)

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Completed

[View](#)