

Bright Health IFP Enrollment Dashboard

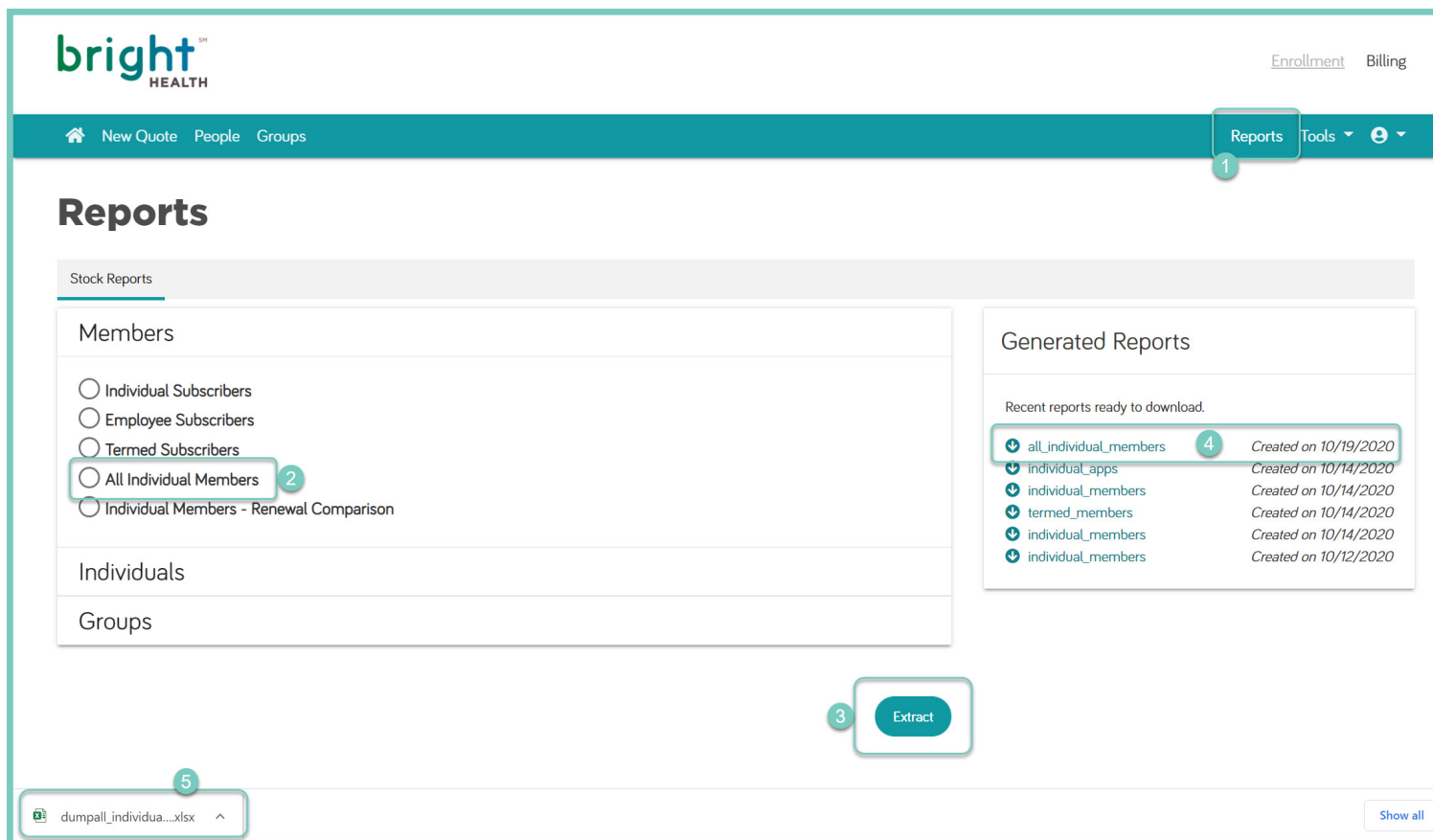
Pulling Your Book of Business

Pull Your Book of Business Directly from the IFP Dashboard

This document takes you through the steps needed to generate an Excel spreadsheet of your book of business on the IFP Dashboard



Note: The IFP Enrollment Dashboard can be accessed in the Broker Portal at BrightHealthBroker.com. Log in, click the Enrollment Dashboards button then select Individual & Family Plans/Small Group



1 Reports

On the top right of the screen select Reports.

2 All Individual Members

Under Members, select All Individual Members.

3 Extract

Select Extract to move your selected report to the Generated Reports section.

4 Generated Reports

Under Generated Reports on the right hand side of the page, select all_individual_members. This report may take a short time to generate. Refresh your browser until it mirrors the image above.

5 Open Excel Download

Open the Excel file from the browser downloads. If you are using Google Chrome, it will look the same as the image above. If using a different browser, file will be in the downloads folder.