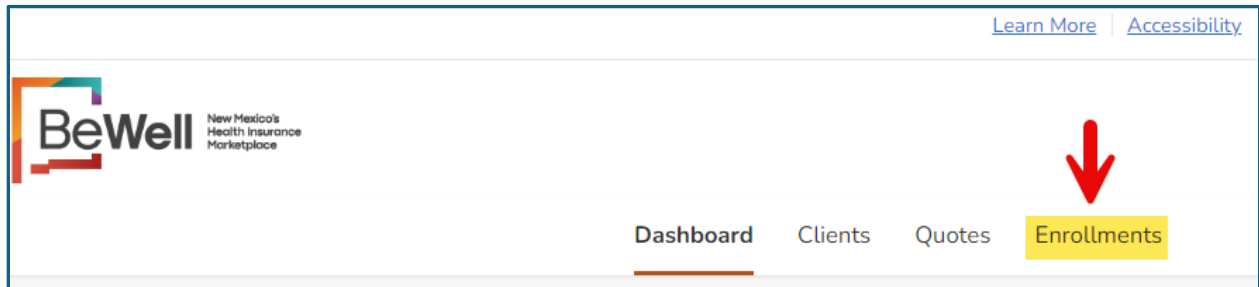
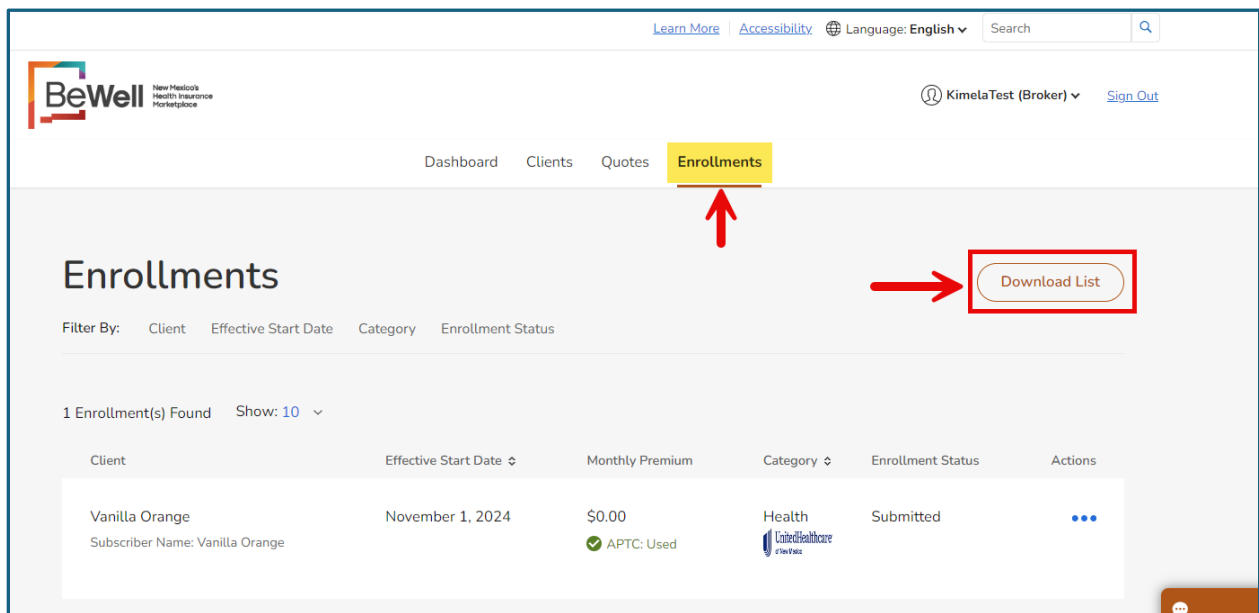


# How to Generate a Broker's Consumer List of Enrollments & See the Carrier and Plan Information

From Your Broker's Dashboard: Click on **Enrollments** to open your *Enrollments* page.

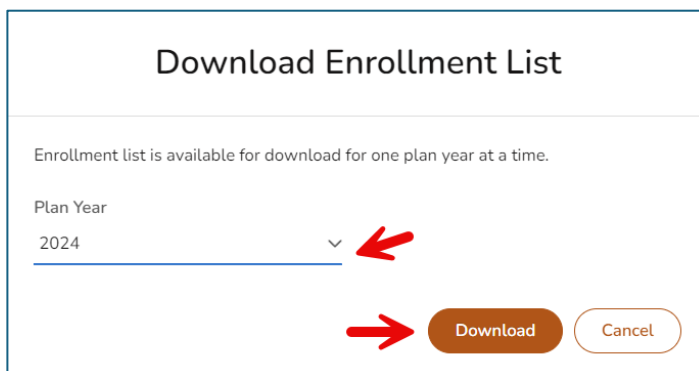


You will see a list of your clients that have Enrollments appear:



## To Download List of Enrollments:

1. Click the **Download List** button at the top of the page to open the *Download Enrollment List* dialog box.



2. Select the plan year on the *Download Enrollment List* dialog box.
3. Click on **Download**.

## How to Generate a Broker's Consumer List of Enrollments & See the Carrier and Plan Information

### To Download List of Enrollments: *(continued...)*

- The enrollment information for the selected year is downloaded into a spreadsheet.  
The filename will be named in the format of: *PYYYY Enrollment for Brokers\_Name.xlsx*

A	B	C	D	E	F	G
<b>Account Reference ID</b>	<b>Client Name</b>	<b>Email Address</b>	<b>Phone Number</b>	<b>Assigned Agency/Broker</b>	<b>Subscriber Name</b>	<b>Enrollment ID</b>
1	RefID_10004370	Vanilla Orange	<a href="mailto:VanillaOrange2@mailinator.com">VanillaOrange2@mailinator.com</a>	(505) 532-3533	KimelaTest Broker	Vanilla Orange
2						RefID_1729620143077
H	I	J	K	L	M	N
<b>Insurer Assigned Policy ID</b>	<b>Member Name - Relationship with Subscriber</b>	<b>Category</b>	<b>Plan Carrier</b>	<b>Plan Name</b>	<b>Monthly Premium</b>	<b>Available Premium Tax Credit</b>
1	-	Vanilla Orange - SELF	Health	United Healthcare of New Mexico	UHC Value Turquoise 2 with EXTRA SAVINGS, HMO/Silver	\$0.00
2					\$0.00	\$2622
O	P	Q	R	S	T	U
<b>Claimed Premium Tax Credit</b>	<b>New Mexico Premium Assistance Applied</b>	<b>Native American Premium Assistance</b>	<b>Total Savings Applied</b>	<b>APTC</b>	<b>Premium Assistance</b>	<b>Submitted On</b>
1						
2	\$460.33	\$0.00	\$0.00	\$460.33	Used	Not Used
						Oct 22, 2024
V	W	X	Y	<h3>Fields in the Downloaded Broker's Enrollment Report</h3> <p>Filename: <a href="#">2024 Enrollment for Brokers_Name.xlsx</a></p>		
<b>Coverage Start Date</b>	<b>Coverage End Date</b>	<b>Enrollment Status</b>	<b>Plan Year</b>			
1						
2	Nov 01, 2024	Dec 31, 2024	Submitted	2024		

### Viewing Details Online to see Carrier and Plan Information:

You can also see this information online by using the **Actions** next to the client you want and selecting **View Details**:


## Enrollments

Download List

Filter By: Client Effective Start Date Category Enrollment Status

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1 Enrollment(s) Found Show: 10


Client	Effective Start Date	Monthly Premium	Category	Enrollment Status	Actions
Vanilla Orange Subscriber Name: Vanilla Orange	November 1, 2024	\$0.00 ✔ APTC: Used	Health 	Submitted	<span>⋮</span> <span style="border: 2px solid red; padding: 5px; display: inline-block;">View Details</span> <span>Act on Behalf of</span>

## Viewing Details Online to see Carrier and Plan Information: *(continued...)*

### Enrollment Details of Vanilla Orange for 2024

Enrollment ID:	Head Of Household Name:	Submitted On:	Effective Date:
RefID_1729620143077	Vanilla Orange	Oct 22, 2024	Nov 01, 2024

Plan selected for **Vanilla Orange** 

Monthly Premium	Carrier	Health Plan Name	Health Plan Assigned Policy ID	Annual Deductibles	Est. Out-of-Pocket Costs
\$0.00 <b>Turquoise Plan</b>		UHC Value Turquoise 2 with EXTRA SAVINGS HMO/Silver	-	\$0.00 / Person \$0.00 / Family	\$800.00 / Person \$1,600.00 / Family

The monthly payment amounts that you see here include the premium tax credit and New Mexico Premium Assistance, which lower your premium costs.

Available Premium Tax Credit:	\$2,622.00
Claimed Premium Tax Credit ⓘ :	\$460.33
New Mexico Premium Assistance Applied ⓘ :	\$0.00
Total Savings Applied ⓘ :	\$460.33

beWellnm Member ID	Member Name	Relationship with Subscriber	Health Plan Assigned ID	Coverage Period From	Coverage Period To	Enrollment Status
700000019571	Vanilla Orange	SELF	-	Nov 01, 2024	Dec 31, 2024	Submitted