MEDICARE CARRIER PORTAL GUIDE
- ACCESS AND BOOK OF BUSINESS DOWNLOAD

Aetna: Aetna Portal Access
- Log in
- Click “Compensation and Reporting” tab up top
- Click “Access Reporting”
- In Enrollment reports click “Medicare book of business report”

HealthSpring: HealthSprings Portal Access
- Log in
- Click down arrow on “Medicare Advantage” tab to the side of screen
- Click “book of business”
- Click "Edit" drop down in right corner
- Click "export" from the drop down menu

Devoted: Devoted Portal Access
- Log in
- Click “Clients” tab on the side of screen

Florida Blue: Florida Blue (BCBS) Portal Access
- Log in
- Click reporting icon on side of screen
- Click “O65 Aligned Accounts”
- Generate report

Freedom & Optimum: F&O Portal Access
- Log in
- Click “reports” on the side of screen
- Click book of business
- Generate report
- Download

Humana & CarePlus: H&CP Portal Access
- Log in
- Look for “My Humana Business” section
- Click “View all customers”
  - » Humana portal is more interactive, can view active policies only, all policies, status etc.

Simply: Simply Portal Access
- Log in
- Click “Book of Business” along top section of portal
  - » In the drop down click clients

Solis: Solis Portal Access
- Log in
- Click on “Book of Business” to the side of screen
- Select preferred options
  - » Select Agent
  - » Status: All clients, Enrolled clients, Disenrolled clients, or Future active
- Click search
- Cannot download a file but can be copied into blank document.

United Health Care: UHC Portal Access
- Log in
- Click “Book of Business” along top section of portal
  - » All members will display but you can filter by active and inactive

WellCare: WellCare Portal Access
- Log in
- Click the “Book of Business” tab on side of screen
- Click “search” and it will automatically load all clients