

# JET Insure Broker Portal Training Guide 2: Portal Reports Access

Primary reports function for broker can be found under “Reports.”

The screenshot shows the Common Ground Healthcare Cooperative Broker Portal. The top navigation bar includes the logo and a user profile with the text "Welcome Test Broker". The main content area is titled "Dashboard - Reports". On the left, there are two main menu sections: "My Work" and "Account". The "My Work" section contains a list of items: Home, Calendar, Documents, Activities, Message Center, Notes Management, Letters, Reports, and Census Templates. The "Reports" item is circled in red. The "Account" section contains: Contacts, My Quotes, Individual Applications, Small Group Applications, Policies, Renewals, and IFP Marketplace Renewals. In the center, a list of report categories is shown: Analytical Reports, Group Reports, IFP Reports, and Renewal Reports. A dropdown menu is open for "Analytical Reports", showing "Member Coverage Details Report" and "Member Details Report". Red arrows point from the "Reports" menu item to the "Analytical Reports" category and from the "Analytical Reports" dropdown to the "Group Reports" and "IFP Reports" categories.

Other reports can be generated from highlighted areas below.

The first screenshot shows the "My Work" menu with the "Letters" item highlighted with a yellow box. The second screenshot shows the "Account" menu with "My Quotes", "Individual Applications", "Small Group Applications", and "Policies" items highlighted with yellow boxes.