How Do I View My Book of Business?

A walkthrough of how to view and download your Book of Business report

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The Chesapeake Life Insurance Company®

What is the BoB Report?

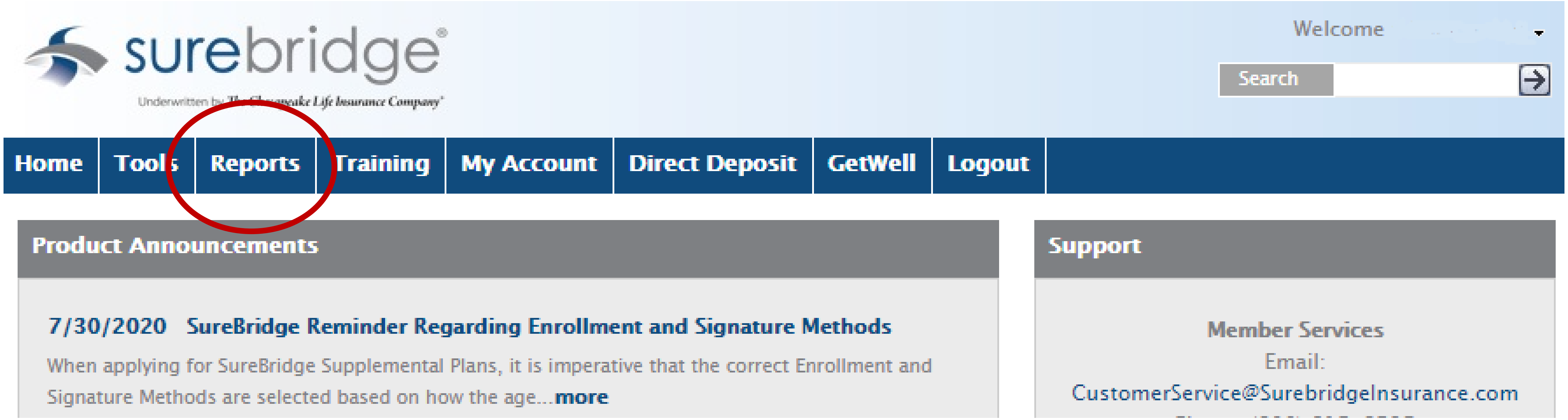
The Book of Business (BoB) report provides you with the status of all your issued business. The report will tell you what policies an insured has, their effective dates, paid to dates, premium amounts, benefit levels, and more.

It is a very helpful tool our agents and agency partners leverage daily and as such, it’s important to know where to find it and how to save copies.

We will cover that as briefly as we can over the next few slides.

Where is the BoB Report?

From the **Home** screen of the **Broker Portal** (www.suppsportal.com), click on the **Reports** tab.



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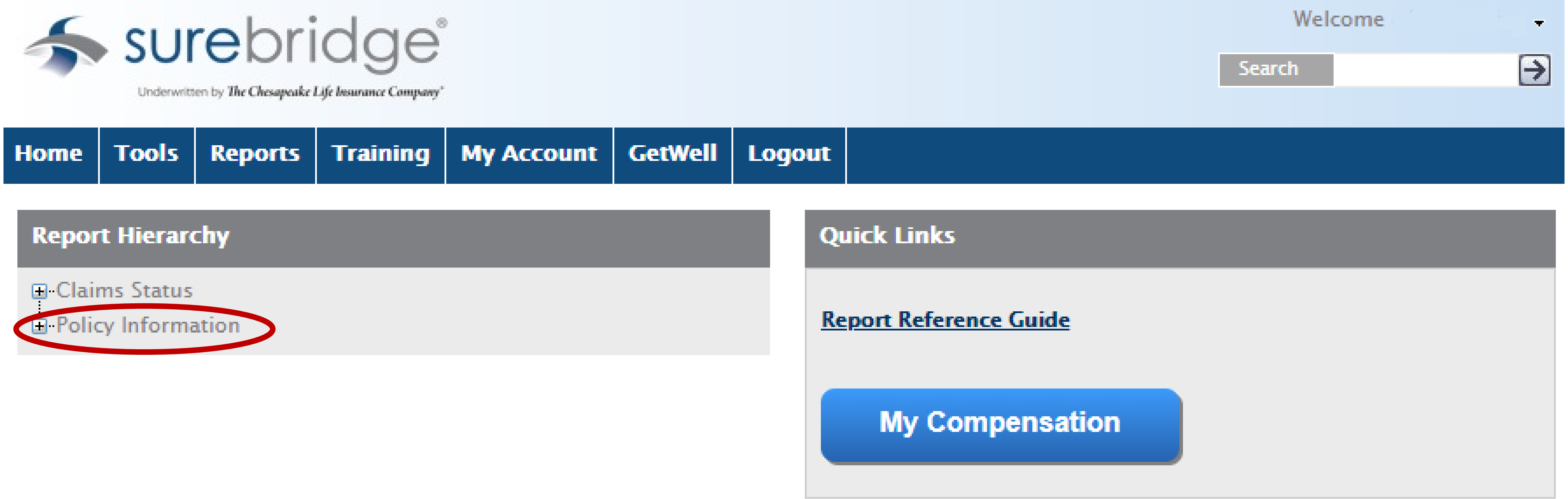
Where is the BoB Report?

On the **Reports** screen, click the dropdown next to **Policy Information**



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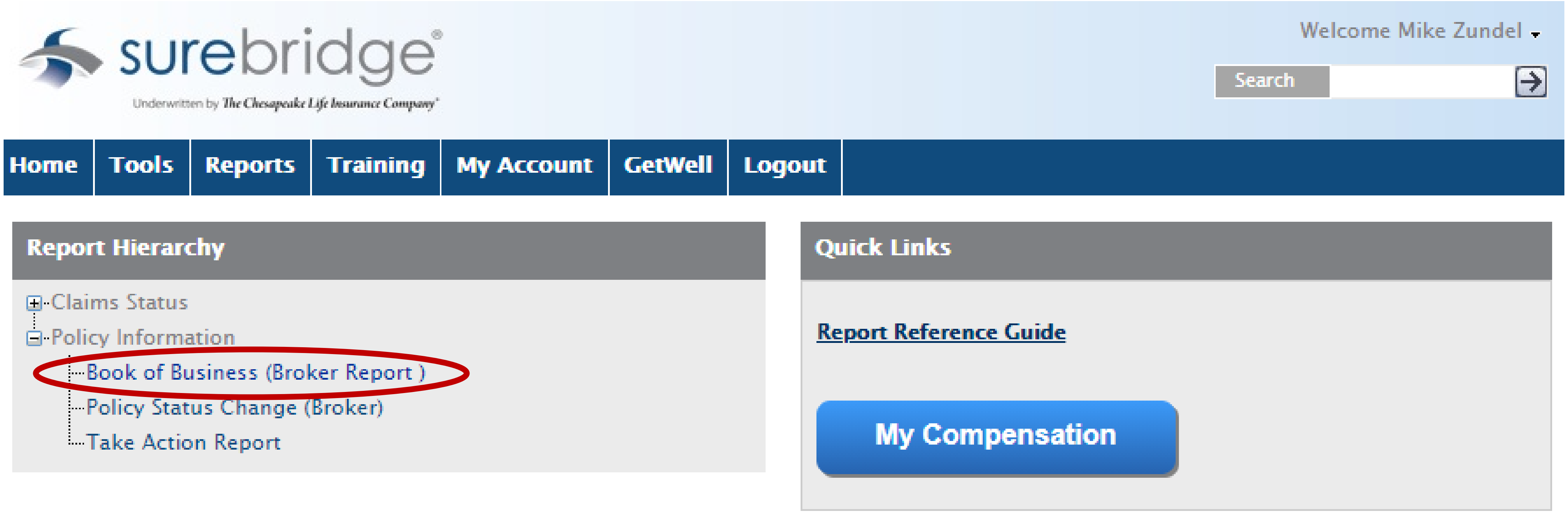
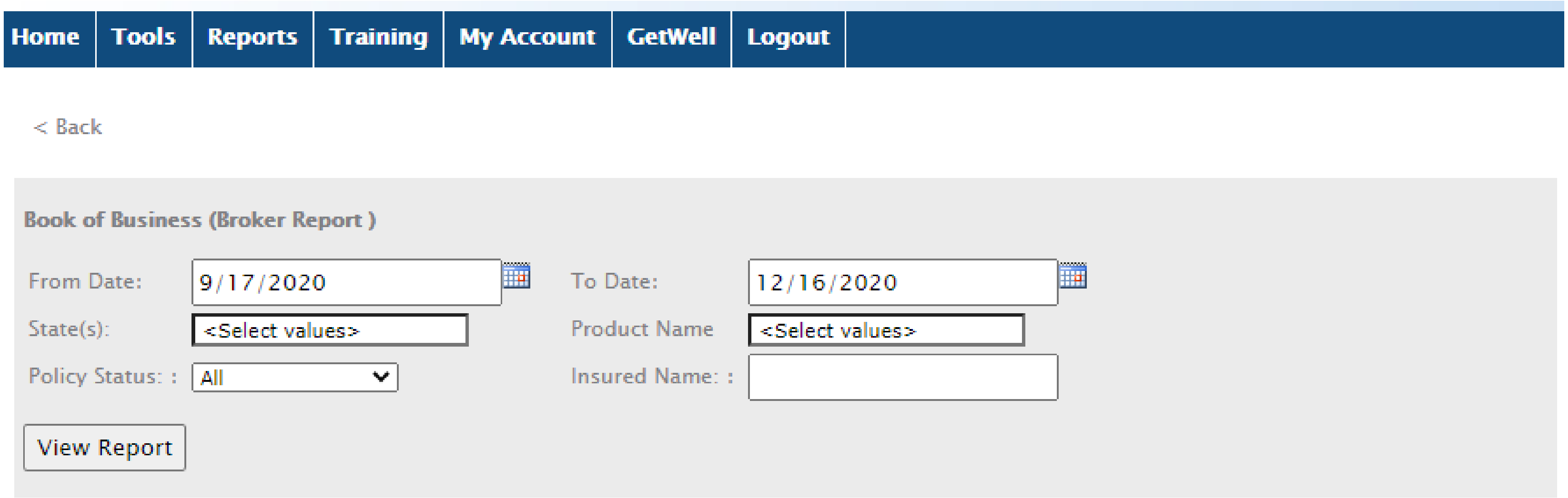
Where is the BoB Report?

From the options presented, select **Book of Business (Broker Report)**



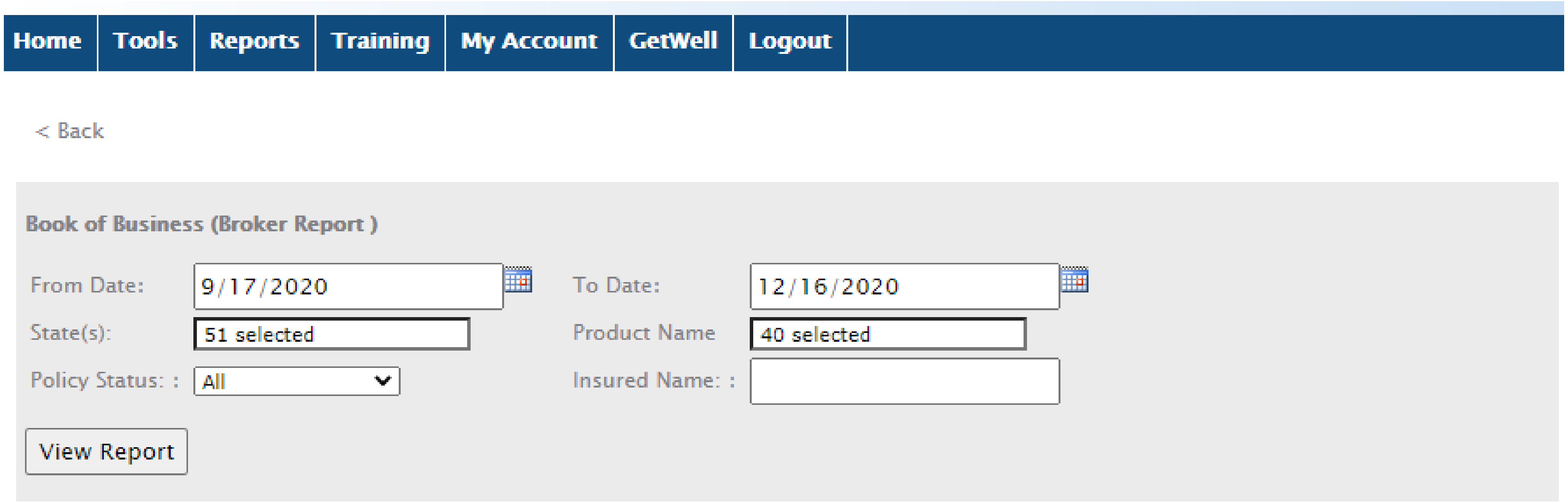
Running a BoB Report

Now you will select your search criteria. Set your time frame, and make you selections. If you want to see everything within a given time frame, make sure you choose “All” for each criteria.



Running a BoB Report

All fields must be addressed, with the exception of the **Insured Name** field.



Reading a BoB Report

In the first eight columns, you will find your NPN, The Insured Name, Policy ID, Application Date, Application Status, and the Status Detail.

NPN	Insured Name	Brand	Policy ID	BCN/List Bill	Application Date	Application Status	Detail Status
012345	Smith, Insured	SB	43G000000		10/19/2020 12:00:00 AM	ACTIVE	Initial Payment Received
012345	Smith, Insured	SB	53G000000		11/16/2020 12:00:00 AM	ACTIVE	Initial Payment Received
012345	Smith, Insured	SB	63G000000		10/8/2020 12:00:00 AM	ACTIVE	Issued
012345	Smith, Insured	SB	34G000000		10/18/2020 12:00:00 AM	ACTIVE	Issued

Reading a BoB Report

The next eight columns you tell you if there is a payment failure and why, if any of the insureds who applied were declined and why, the policy status, the product name, if it was a Guaranteed Issue plan, and the Issue State.

Payment Failure Date	Payment Failure Reason	Individual Declines/Postpones	Policy Status	Product Name	GI Plan	Bun	Issue State
			In-force	Sr. Prime DVH			WI
			In-force	Sr. Prime DVH			MI
			In-force	Sr. Prime DVH			TX
			In-force	Sr. Prime DVH			TN

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Reading a BoB Report

In the last nine columns, you will see the Effective Date, Paid to Date, Billing Mode, Billing Type, Premium amount, Benefit Level, Months in Force, and the client's Home Phone Number.

Effective Date	Paid to Date	Bill Mode	Bill Type	Premium $	Benefit Level	Months in Force	Work Phone	Home Phone
12/1/2020 12:00:00 AM	1/1/2021 12:00:00 AM	M	ACH/EFT	38.00	0001000	001		7323328503
12/1/2020 12:00:00 AM	1/1/2021 12:00:00 AM	M	ACH/EFT	29.00	0001000	001		5867646378
11/1/2020 12:00:00 AM	1/1/2021 12:00:00 AM	M	ACH/EFT	29.00	0001000	001		3612460235
10/19/2020 12:00:00 AM	12/19/2020 12:00:00 AM	M	ACH/EFT	29.00	0001000	002		5053488090

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Downloading a BoB Report

To download the BoB report, look at the criteria at the top of the page and you will find a dropdown next to the **Export** option. The system defaults to Excel, which will result in a report that looks exactly like the one you see on your screen. If you need the raw data with no formatting, we recommend downloading the file in .CSV format.