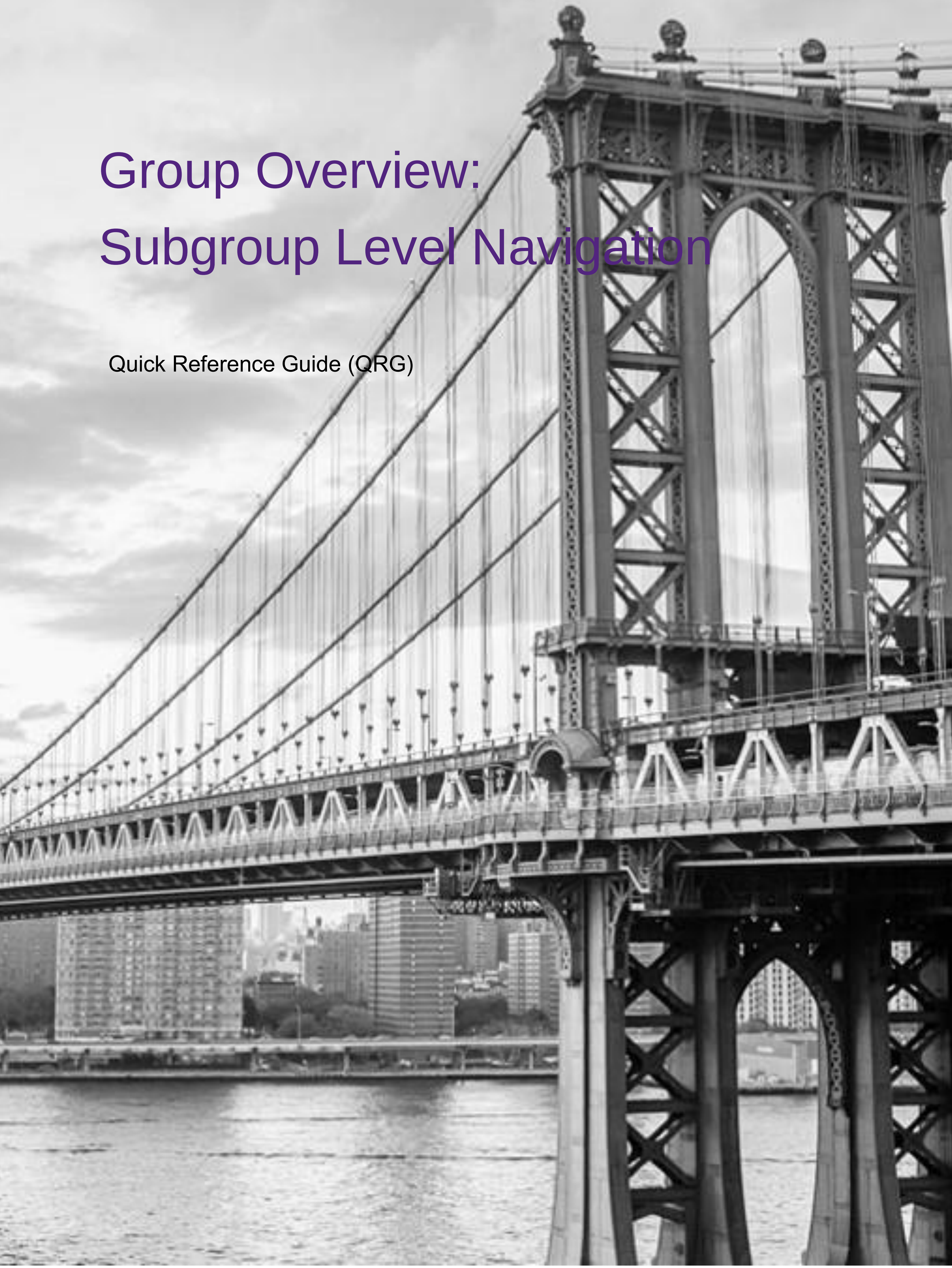
Group Overview:

Subgroup Level Navigation

Quick Reference Guide (QRG)



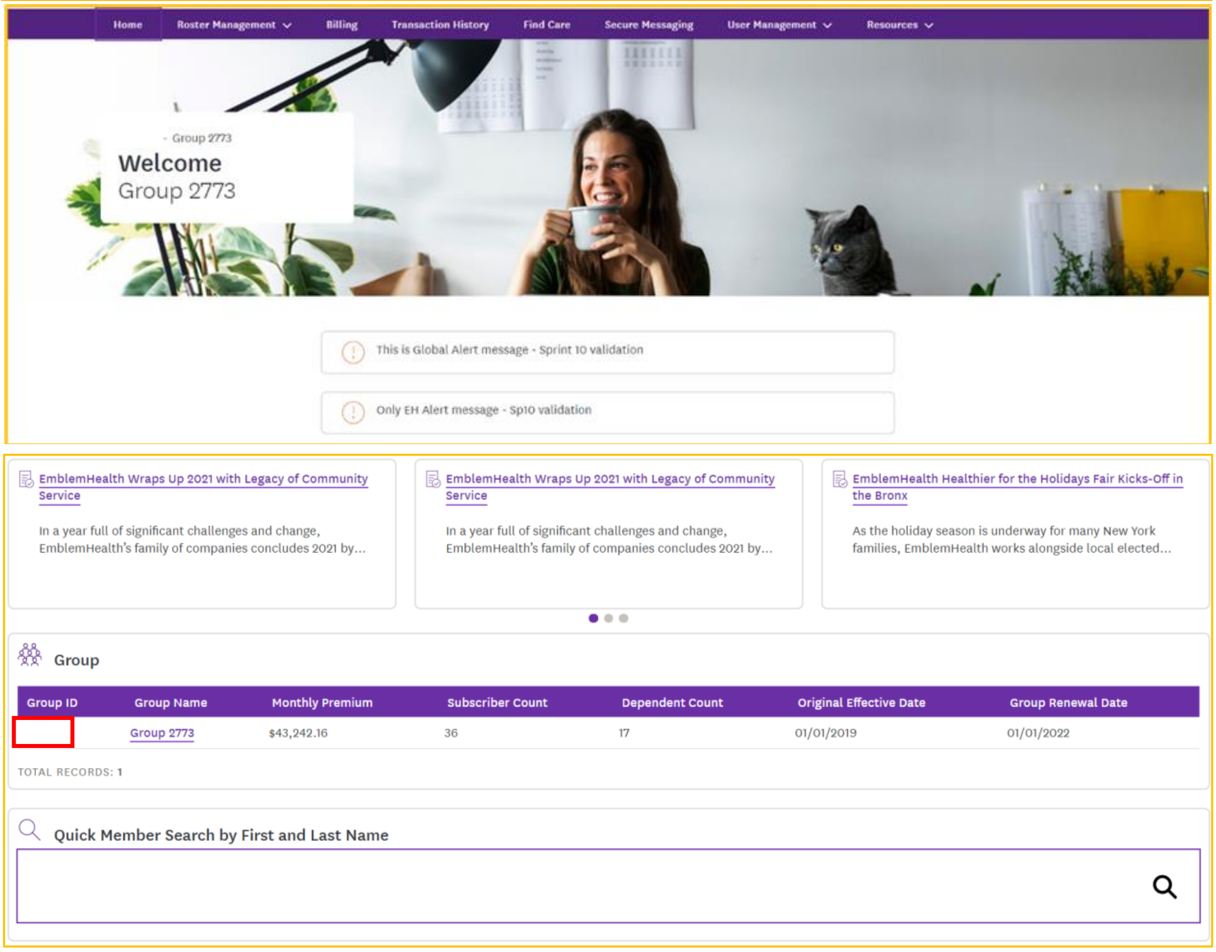
Subgroup Level Navigation

Purpose: Overview of Subgroup Level Navigation.

Step 1:

Sign in into the portal. The **Home Page (Dashboard)** displays.

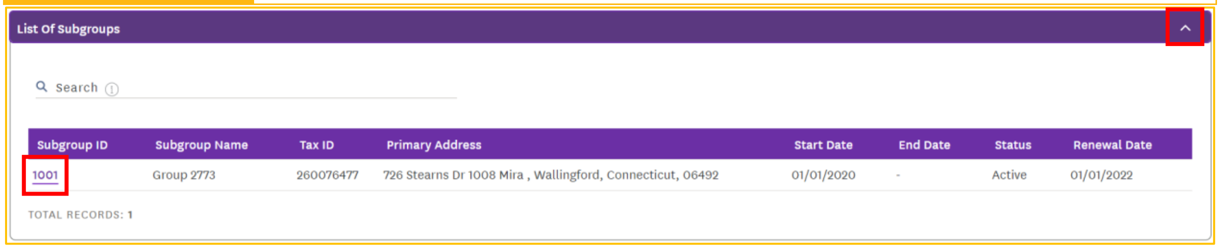
1. Scroll Down.
2. Click the **Group ID**.



Step 2:

This is the List of Subgroups card.

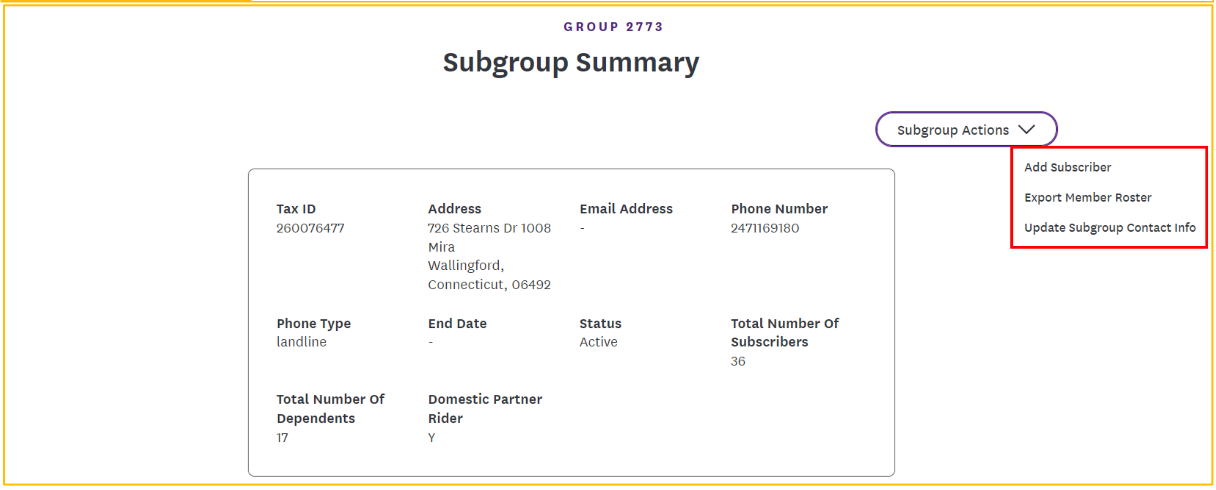
1. Click the arrow icon to view Subgroup details.
2. Click **Subgroup ID.**



Step 3:

The Subgroup Summary displays.

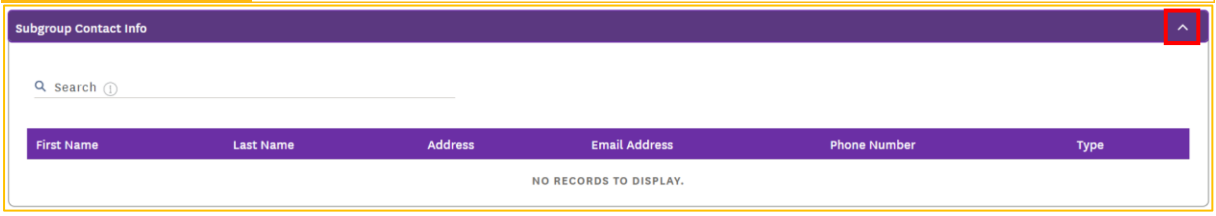
1. View an overview of the subgroup's Tax Id, Address, Email Address, Phone Number, Phone Type, Coverage Term Date (if applicable), Status, Total Number of Subscribers, Total Number of Dependents, and Domestic Partner Rider of the subgroup.
   Note: The Shop Certified attribute only appears for Small Groups.
2. (Optional) View available subgroup-level actions by clicking on the **Subgroup Actions** button. Possible actions, based on access level, include **Add Subscriber**, **Export Member Roster**, and **Change Subgroup Contact Info**.
   Note: The same three actions are available at the group level. Additional actions for individual members (e.g., Terminate Coverage, Add Dependent, etc.) can be performed from the Roster Management menu on the Home page.



Step 4:

This is the Subgroup Contact Info card, which displays group contact details for the Primary Admin and Billing POC, as available.

1. Click the arrow icon to view First Name, Last Name, Address, Email Address, Phone Number, and Type.



Step 5:

This is the Subgroup Member Plan details card.

1. Click the arrow icon to get overview of Plan details of Subscriber, Members, Medical, Dental, Vision, and Pharmacy of the Subgroup.
   Note: Displays active and termed Medical, Dental, Vision and Pharmacy plans associated with subgroup for a rolling 24-month period.

Sub-Group Member Plan details

SUBSCRIBERS | MEMBERS | MEDICAL | DENTAL | VISION | PHARMACY

Export Subscriber Roster

Member ID	Name	Date of Birth	SSN	Gender	Relationship to Subscriber	Coverage Start Date	Termination Date	Original Effective Date	Status
K8049400001	ALEX, LAWREN HAROLD	01/31/1954	xxx-xx-7785	Male	Subscriber	01/01/2020	-	01/01/2019	Active

Step 6:

This is the Subgroup Plan Tier Coverage card.

1. Click the arrow icon to view the Medical, Dental, Vision, and Pharmacy Plan tier coverage details of the subgroup, as available.

Subgroup Plan Tier Coverage

MEDICAL | DENTAL | VISION | PHARMACY

Search

Export to Excel

SubGroup ID	Class ID	Class Name	Plan ID	Plan Name	Total Employees Only	Total Employees and Spouse OR Employees and Dependent* (* for 3 tier plans)	Total Employees and Child(ren)	Total Family
1001	1001		ME001160	EMBLEMHEALTH EPO	7	2	5	0
1001	1001		MH000001	EMBLEMHEALTH HMO PREFERRED PLUS	1	0	0	0
1001	1001		MP001090	EMBLEMHEALTH PPO	10	1	2	1
1001	4001		ME001160	EMBLEMHEALTH EPO	4	0	0	0

Step 7:

This is the Plan rate card.

1. Click the arrow icon to view Class ID, Class Name, Plan ID, Plan Name, and plan charges for the available plan tier structure.
   Note: There are various available plan tier structures. Columns will be populated in accordance with your tier structure. Yours may have different or fewer columns (e.g., Employee+Spouse/Employee+Dependent column may not appear).

Plan Rate

Search

Export to Excel

Class ID	Class Name	Plan ID	Plan Name	Employees only	Employees and Spouse OR Employees and Dependent* (* for 3 tier plans)	Employee+Child(ren)	Family	Start Date
1001		ME001160	EMBLEMHEALTH EPO	$919.12	$2,049.63	$1,544.12	$2,913.61	01/01/2020
1001		MP001090	EMBLEMHEALTH PPO	$1,021.00	$2,276.83	$1,715.28	$3,236.57	01/01/2020
4001		ME001160	EMBLEMHEALTH EPO	$919.12	$2,049.63	$1,544.12	$2,913.61	01/01/2020
4001		MP001090	EMBLEMHEALTH PPO	$1,021.00	$2,276.83	$1,715.28	$3,236.57	01/01/2020

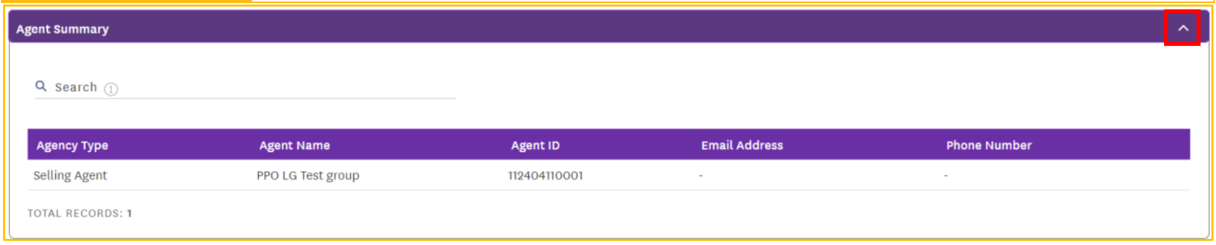
TOTAL RECORDS: 4

Step 9:

This is the Agent Summary card.

1. Click the arrow icon to view Selling Agent details, including Agency Type, Agent Name, Agent ID, Email Address, and Phone Number.

   Note: For groups with Agency on record as House Account, the Agent Type and Name will display House. Other agency types include Selling Agent, General Agent, and Broker.



Agency Type	Agent Name	Agent ID	Email Address	Phone Number
Selling Agent	PPO LG Test group	112404110001	-	-


Thank
You