

# Dashboard Navigation

Quick Reference Guide (QRG)



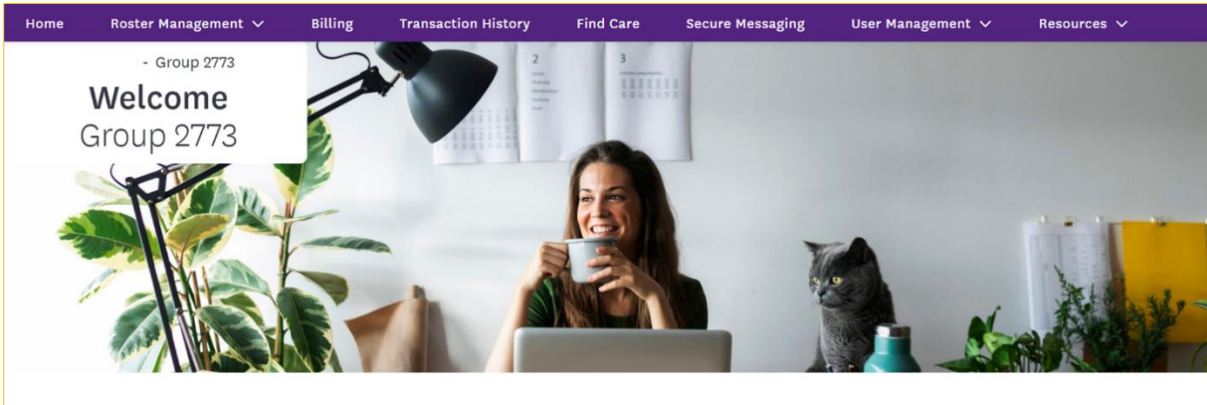
**Purpose: Overview of Dashboard Navigation.**



**Step 1:**

After signing into the portal, the **Home Page (Dashboard)** displays.

1. On the **Dashboard**, you can the following sections: News & Announcements, Group info, Billing snapshot, Renewal notifications, Member search, and Recent cases.



**Step 2:**

This is the News & Announcements section.

1. You can view updates from EmblemHealth.

[EmblemHealth Healthier for the Holidays Fair Kicks-Off in the Bronx](#)

As the holiday season is underway for many New York families,...

[EmblemHealth Hosts Healthy Food Giveaway Events Across NYC](#)

As the Holiday nears, EmblemHealth, one of the nation's largest nonprofit...

[EmblemHealth Partners with UFT to Battle Breast Cancer](#)

New Screening Program Encourages Breast Cancer Prevention for Union...

**Group**

Group ID	Group Name	Monthly Premium	Subscriber Count	Dependent Count	Original Effective Date	Group Renewal Date
	Group 2773	\$43,242.16	36	17	01/01/2019	01/01/2022

TOTAL RECORDS: 1



## Step 3:

This is the Group card.

1. View an overview of your groups, including monthly premium, Subscriber and Dependent counts, Original Effective Date and Group Renewal Date.

**Note:** Only commercial plan renewal dates are displayed on the renewal card. Renewal dates for Medicare plans will not be displayed in the portal. Medical plans will be renewed on 1/1 each year. If a group has two subgroups with different renewal dates, the first renewal date will be displayed 60 days in advance and 30 days after. The second renewal date will override the first renewal date 60 days in advance of the second renewal date.

### Group

Group ID	Group Name	Monthly Premium	Subscriber Count	Dependent Count	Original Effective Date	Group Renewal Date
Group 2773		\$43,242.16	36	17	01/01/2019	01/01/2022

TOTAL RECORDS: 1

### Renewals

Group 2773 is scheduled for renewal on 01/01/2022.



## Step 4:

This is the Renewals card.

1. View upcoming renewal dates and associated plans.

### Renewals

Group 2773 is scheduled for renewal on 01/01/2022.

The commercial plan(s) listed below will be discontinued upon the group's renewal date:

- EMBLEMHEALTH PPO - MPO01090
- EMBLEMHEALTH HMO PREFERRED PLUS - MH000001
- EMBLEMHEALTH EPO - ME001160

[View Group Plans](#)



## Step 5:

This is the Quick Member search card.  
1. Search for a member by name or Member ID in the search field.

Quick Member search

LAWREN

LAWREN HAROLD ALEX K8049400001 461 Cherry 967, New York, NY, 10027



## Step 6:

This is the Bills card.  
1. Quickly access your available bills.

Bills


[View available bills](#)



## Step 7:

This is the Recent Transactions card.

1. View your last 5 transactions in the portal, including Transaction Type, Date Submitted, Submitted By, Submitted For, and Transaction Status. **Note:** Admin users will be able to view transactions by all portal users in their group or subgroup. All other users will be able to view just their own transactions. Transactions by brokers or customer service will not be displayed.

 Recent Transactions

Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by	Transaction Status
07528776	-			1124041 SG 1001	01/07/2022 03:39 AM	Lauren Lewis	Open*
07528774	Add Subscriber	1001	1124041 SG 1001	-	01/06/2022 03:14 AM	Lauren Lewis	In Progress
07528773	Change Name	1001	1124041 SG 1001	LAWREN HAROLD ALEX	01/05/2022 07:31 PM	Lauren Lewis	Open*
07528771	Add Subscriber	1001	1124041 SG 1001	-	01/04/2022 07:27 PM	Lauren Lewis	-
07528770	Request ID Card	1001	1124041 SG 1001	LAWREN HAROLD ALEX	01/03/2022 10:54 PM	Lauren Lewis	Completed

Only the 5 recent transactions are listed here  
\*Only "Open" transactions may be cancelled.

[Click Here for Details](#)



Thank  
You

