# Group Overview:
# Subgroup Level Navigation

Quick Reference Guide (QRG)

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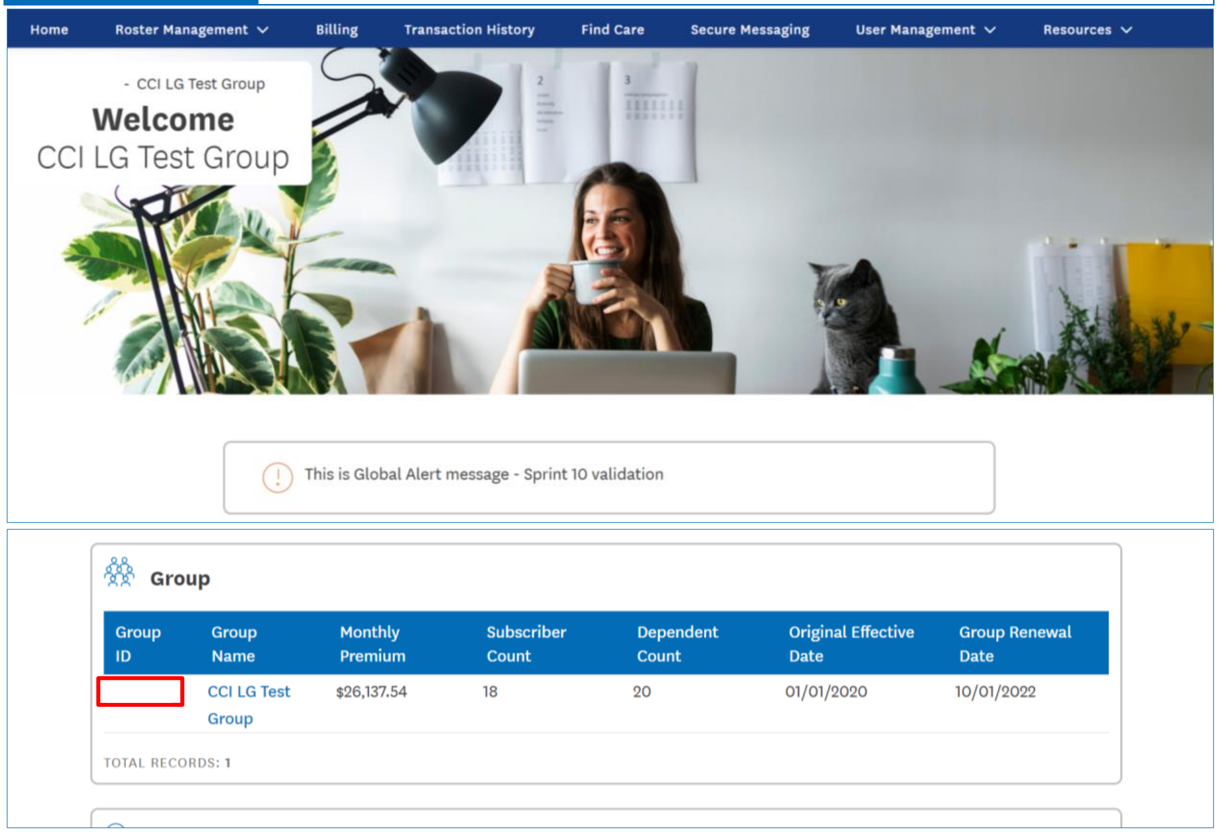
**Purpose: Overview of Subgroup Navigation.**

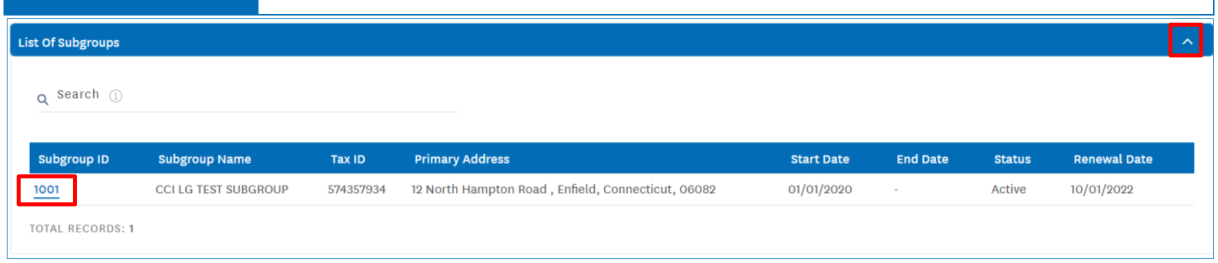
**Step 1:**

Signing into the portal, the **Home Page (Dashboard)** displays.
1. Scroll Down.
2. Click the **Group ID**.




**Step 2:**

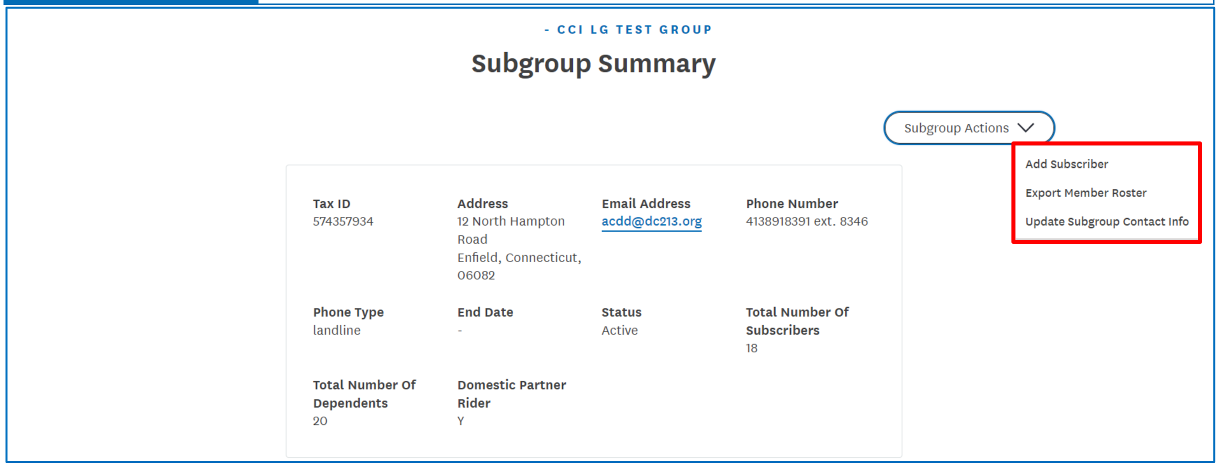
This is the List of Subgroups card.
1. Click the arrow icon to view Subgroup details.
2. Click **Subgroup ID.**



**Step 3:**

The Subgroup Summary displays.

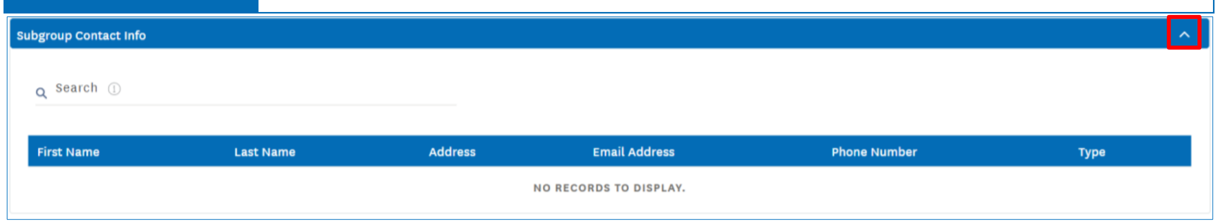
1. View an overview of your Tax Id, Address, Email Address, Phone Number, Phone Type, Coverage Term Date (if applicable), Status, Total Number of Subscribers, Total Number of Dependents, and Domestic Partner Rider of the subgroup.
   **Note:** The Shop Certified attribute only appears for Small Groups.
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.



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**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 |
|---|---|---|---|---|---|---|---|---|---|
| K5500160801 | BEDFORD, SARAH | 01/01/1976 | xxx-xx-8786 | Female | Subscriber | 01/01/2020 | - | 01/01/2020 | Active |
| K5500162001 | COOK, ANDREW | 08/06/1967 | xxx-xx-0099 | Male | Subscriber | 01/01/2020 | - | 01/01/2020 | Active |
| K5500161901 | FRANCO, MATHEW | 09/01/1967 | xxx-xx-6545 | Male | Subscriber | 01/01/2020 | - | 01/01/2020 | Active |
| K2500001901 | HOC, Sridhar | 01/05/1983 | xxx-xx-6333 | Male | Subscriber | 01/01/2021 | - | 01/01/2021 | Active |
| K5500161201 | JACKSON, AMY | 09/06/1965 | xxx-xx-8778 | Female | Subscriber | 01/01/2020 | 01/21/2021 | 01/01/2020 | Inactive |

**Step 6:**

This is the Subgroup Plan Tier Coverage card.

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

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 | | MS030006 | FLEXPOS HSA $3000/$6000 CNT 07 | 4 | 2 | 4 | 7 |
| 1001 | 1001 | | MS030007 | FLEXPOS HSA $3000/$6000 CNT 07 | 1 | 0 | 0 | 0 |

TOTAL RECORDS: 2

**Step 7:**

This is the Subgroup Documents card.

1. Click the arrow icon to view Documents Name and Category of the documents.
   **Note:** Creditable Coverage for Medicare Part D, when available, will display here for download.

Subgroup Documents

| Document Name | Category |
|---|---|

NO RECORDS TO DISPLAY.

**Step 8:**

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 | | MS030006 | FLEXPOS HSA $3000/$6000 CNT 07 | $783.12 | $989.01 | $1,231.55 | $2,300.12 | 01/01/2020 |

TOTAL RECORDS: 1

**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.
2. **Note:** Agency types include Selling Agent, General Agent, Broker, and Agency.

Agent Summary

Search

| Agency Type | Agent Name | Agent ID | Email Address | Phone Number |
|---|---|---|---|---|
| Selling Agent | TEST, BROKER 19 | 111000000019 | testbk19@mail.com | - |

TOTAL RECORDS: 1

# Thank You