

Dashboard Navigation

Quick Reference Guide (QRG)



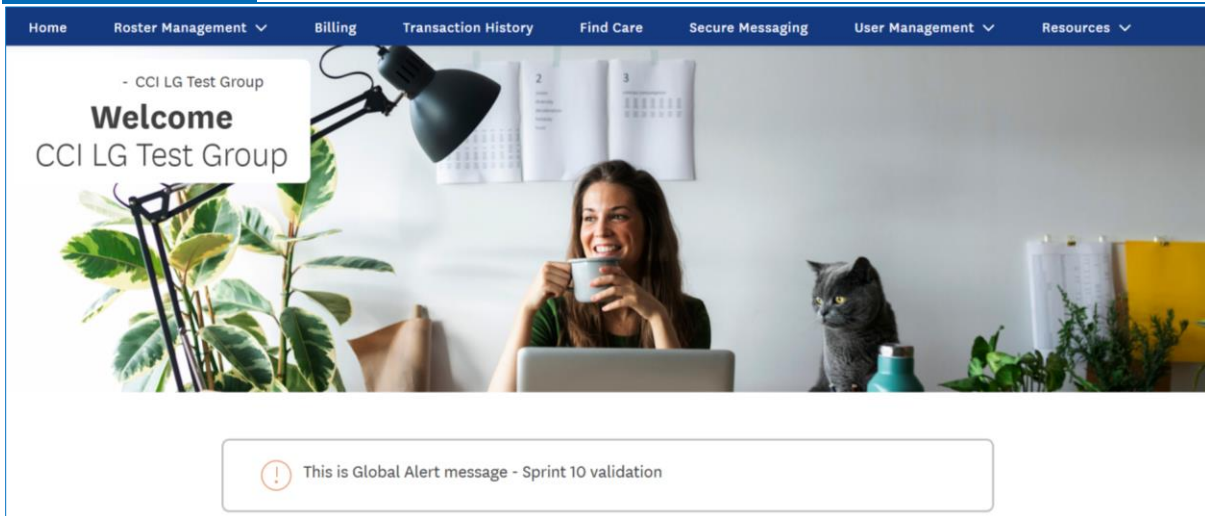
Purpose: Overview of Dashboard Navigation.



Step 1:

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

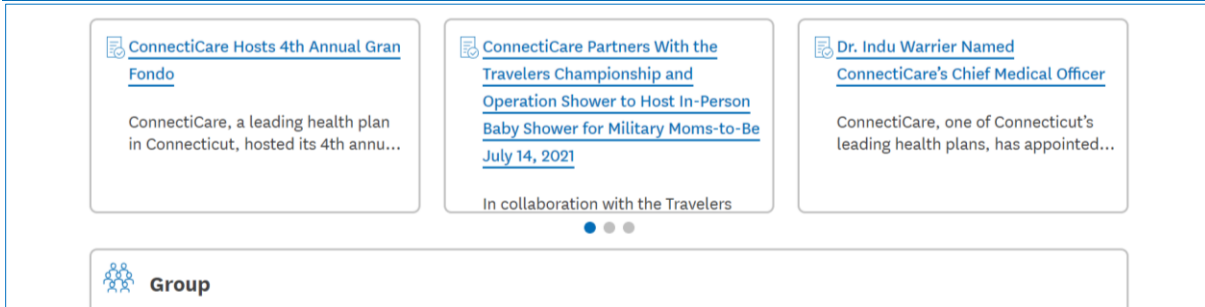
1. On the **Dashboard**, you can view the following sections: News & Announcements, Group info, Billing snapshot, Renewal notifications, Member search, and Recent cases.



Step 2:

This is the News & Announcements section.

1. You can view updates from ConnectiCare.





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
	CCI LG Test Group	\$26,137.54	18	20	01/01/2020	10/01/2022

TOTAL RECORDS: 1



Step 4:

This is the Renewals card.

1. View upcoming renewal dates and associated plans.



Renewals

Group 1501 is scheduled for renewal on 02/01/2022.

[View Group Plans](#)



Step 5:

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

Quick Member search

Franco

MATT PATEL K5500161002 12 FIRST STREEET,New York,NY,10011

AYAN MATHEW K5500188203 12 MADISON AVE,New York,NY,10001

arthi MATHEW K5500188202 12 MADISON AVE,New York,NY,10001

AARAV MATHEW K5500188201 12 MADISON AVE,New York,NY,10001

MATHEW FRANCO K5500161901 11 SECOND STREET,New York,NY,10011



Step 6:

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

Bills

[View available bills](#)

Recent Transactions



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
07528775	Add Subscriber	1001	CCI LG TEST SUBGROUP	-	01/06/2022 05:54 AM	Saby	In Progress
07528772	Add Dependent	1001	CCI LG TEST SUBGROUP	Wilson James	01/05/2022 01:08 AM	Saby	-
07528757	Change Group Primary POC			CCI LG Test Group	12/29/2021 10:10 PM	Saby	Open*
07528755	Upload Employee Census	1001	CCI LG TEST SUBGROUP	CCI LG TEST SUBGROUP	12/29/2021 11:48 AM	Saby	-
07528753	-			-	12/28/2021 12:02 PM	Saby	Open*

Only the 5 recent transactions are listed here

*Only "Open" transactions may be cancelled.

[Click Here for Details](#)

Thank
You