**Member/Enrollment Portal**

**1. Dashboard (Summary)**

* Member Name, Member ID
* Active Coverage Details (plan, product type, effective dates)
* Outstanding Billing/Payments
* Recent Claims/Service History
* Notices, Letters, Messages

**2. Enrollment/Policy Details**

* Subscriber/Dependent List: Name, Relationship, DOB, gender, SSN
* Coverage(s): Plan code, Coverage Type (Health, Dental, Vision, Rx), Product Type, Tier, Effective/Termination Dates, Premium, Subsidies
* Policy Status (Active, Terminated, Pending)
* Marketplace IDs (for ACA): Marketplace Policy ID, APTC amount, CSR variant
* Group plan IDs (Group LOB): Employer Group ID, eligibility class, class code, payroll tier, retiree flag
* Medicaid: Aid category, eligibility group, residency state, pregnancy indicator
* Medicare: Medicare ID, Part D coverage, late enrollment penalty, LIS level
* MPPP: MPPP enrolled flag, installment amount, Rx premium balance

**3. Member Profile/Contact Info**

* First Name, Last Name, Middle, Suffix/Prefix
* Address, Phone, Email
* Preferred communication mode, language
* Demographics: DOB, marital status, ethnicity, race, citizenship, immigration status

**4. Dependent Management**

* List & Add/Edit/Remove Dependents (uses same fields as enrollment for each dependent)

**5. Billing/Invoices**

* Invoice Date, Amount Due, Status (Paid, Due, Overdue)
* Premium breakdown: Total premium, employer/employee contribution (Group), APTC/CSR subsidies (ACA)
* Payment history and upcoming amounts

**6. Payment Center**

* Pay Your Bill (ACH, Credit/Debit, Check)
* Scheduled Payments
* Payment Confirmation/Status

**7. ID Cards/Document Downloads**

* Download/Request Member ID Card, Coverage Details PDF
* Notices (Plan Change, APTC update, termination, etc.)
* Fulfillment status for ID card requests and other documents

**8. Claims & Benefits (if included)**

* View claims, service type, adjudication status, paid amounts, next actions
* Benefit details: Coverage level, copay, deductible

**Carrier/Group Portal – Admin Pages (per LOB)**

**1. Plan/Group Management**

* Plan Details: Name, ID, product type, coverage tiers
* Group: Employer name, group ID, payroll/funding model, class codes, division codes, retiree flags
* Rates, contribution percentages

**2. Enrollment/Billing & Reconciliation**

* Member census, eligibility windows
* Invoice/statement generation, distribution, reconciliation status
* Billing relationships (sponsor, payer, group)
* COBRA eligibility/events for Group LOB

**3. Policy/Enrollment Audit Logs**

* Change history: Source (portal/834/API), type (new, update, terminate, reinstate), impacted fields, timestamps

**4. Communications/Fulfillment**

* Notice delivery: Welcome letters, ID cards, payment reminders by LOB
* Fulfillment status: Sent, failed, in progress
* Member outreach triggers and logs

**Internal/CSR Portal**

**1. Member/Policy Search & Service**

* Universal search: member ID, policy ID, group ID, Medicare/Medicaid ID, etc.
* Policy viewing/editing (role-based controls)
* Demographic/Contact updates
* Audit trail of changes and CSR actions

**2. Ticket/Service Case Management**

* Open/track service requests (address change, document upload, dispute)
* Communication log tied to service tickets

**Guest Portal (Prospective Member)**

**1. Plan Shopping & Quoting**

* Plan comparison by zip, age, household, LOB (ACA/Medicare/Medicaid/Group)
* Quoting: Premiums, subsidy estimates, eligibility questions

**2. Enrollment Start**

* Intake basic info, pre-screening fields
* Direct to Member Portal upon account creation

**Line of Business (LOB) Specific Fields & Pages**

| **LOB** | **Enrollment Fields** | **Billing/Payment** | **Special Pages** |
| --- | --- | --- | --- |
| ACA | Marketplace Policy ID, APTC, CSR | Premium, subsidies | SEP confirmation, APTC/CSR changes |
| Group | Employergroup ID, class code, division | Employee/Employer contrib. | COBRA events, retiree windows |
| Medicaid | Aid category, eligibility group, pregnancy | N/A (mostly State managed) | Redetermination, outreach |
| Medicare | Medicare ID, LIS, SEP, penalties | Premium, Part D Rx, MPPP | MPPP installment pages |
| MPPP | MPPP enrolled, installment amount, balance | Rx premium, installment amt | Payment plan management |