* USE

**AM-011 Manage Individual Information Use Case**

**Use Case**

**Colorado Health Benefit Exchange (COHBE)**

**Version 1.0**

**October 17, 2012**

REVISION HISTORY

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Modified By | Description |
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| 0.2 | 2012-09-28 | Diane Dunn | Incorporating comments from Discovery JAD |
| 0.3 | 2012-10-15 | Rob Merry | Incorporating updates from BPM changes |
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# Use Case: Manage Individual Information

## Goal

The goal of this Use Case is allow individual users to update and manage their account information. This may include changes in household composition. An actor initiates the modification of information associated to the Individual on the Exchange. Based on the information changed, other processes may occur. For example, the Report Life Change Event Use Case will be called if the individual reported the birth of a child.

This Use Case completes successfully when the individual has reviewed, added, updated, or deleted information related to their account.

## Brief Description

The individual will go to the Individual Exchange, and enter their user name and password to log into the Exchange. After entering the login credentials, the system will retrieve the account information to display to the Individual. The Individual will review their account information and manage their account. If updates are made to My Profile fields, the system will update the Database record. The user will proceed to next steps.

## Requirements Traceability

The following requirements are covered within this Use Case:

EL015: The Customer, through the Customer’s account profile can view the Customer’s coverage history, notifications, invoices (employers), and enrollment status (individuals).

EL275: The System will enable the Customers to return to the Exchange to update their account profile, including renewing their enrollment, renewing their exemption eligibility, or updating personal information.

GF076: Service Representatives will be able to perform all of the activities of the System on behalf of Customers, should Customers need assistance or not have access to the System. Activities of Service Representatives will be limited to the functions required by their roles.

GF280: The System shall provide the ability to make authorized corrections and modifications after initial entry.

IN040: The Individual System will provide individual households with an individual homepage to view their current coverage plans, contributions, enrollment status, etc.

EL270: The Exchange has the ability to receive information potentially impacting eligibility from other sources and has a process for evaluating the data.

EL276: The System shall provide the ability for Customers to report any changes in life status event. If appropriate, the Exchange will determine the action to be taken which can be an automatic trigger to the interface with the External Eligibility Service. If the Customer’s change requires manual action by the Customer, the Customer will be prompted to perform action needed. Otherwise, the Customer will be informed that no action is needed.

## Primary Actor

### Individual

An individual who has an account on the system will begin the Manage Individual Information Use Case.

### Employee

An employee who has an account on the system will begin the Manage Individual Information Use Case.

### Broker

Brokers logging in through their broker account may begin Manage Individual Information Use Case.

### Navigator

Removed for separate tracking

### Service Rep

Removed for separate tracking

## Secondary Actor

### Exchange

The Exchange validates and stores data. If necessary, the system will send the user to another use case depending on need.

## Pre-Conditions

* User selects Individual Portal.
* Brokers, Service Representatives, and Navigators will be signed into their own accounts before entering the Individual Portal to manage information for their client.
* Data elements to be populated and verified prior to this Use Case include:
* Name (First, Middle, Last)
* Date of Birth
* Login/Password
* Preferred Language
* Contact Preference
* Email
* Mailing Address
* Security Questions/Answers (1,2 and 3)

## Successful Post-Conditions

* Updates are made to the individual’s account and any relevant updates will be sent to the Carriers and Healthation as needed.
* Business Rules navigate Individual to Life Status Change, Enrollment or Plan Selection.
* Data elements listed as required in section 5.10 are populated.

## Triggers

* User clicks on My Account from any page in the Individual Portal and logs into their account.

## Assumptions

* Brokers will have agency agreements in place prior to accessing the client’s Individual Portal account. The agreements will be covered in Broker training.
* Left hand navigation names and screen captions will be updated as needed after UI review. References to left navigation names and screen captions are based on the current hCentive demo.
* hCentive is removing the My Bills and Payments link on left navigation and references to this area will be removed from the rest of the Use Case.
* The changes in circumstance listed in section 2.1.4, Manage Information, may need to be further defined in the detailed design phase.

# Flow of Events

The Business Process Activity diagram below shows the COHBE processes for the Manage Individual Information Use Case. The steps numbered on the diagram below have detailed explanations in the sections that follow.



## Basic (Main) Flow – Manage Individual Information

Individual goes to the Individual Exchange to change my profile data that does not affect the Individual’s life status. Changes made to My Profile will update the record in the Data Base.

### Log In to Individual Portal

To access account information, the user logs into the Individual Portal using their login credentials

### Retrieves Account Information to Display

The Exchange System retrieves account information for the individual and the data is displayed to the user.

### Review Account Information

The individual lands on the Overview Page and reviews the displayed information.

### Manage Information

The overview screen will help drive what the individual needs to do. The individual’s Enrollment Progress will be displayed as well as a section to help individuals make updates that could affect their health benefits.

The following changes in circumstances that could affect health benefits will be displayed to the individual:

* Marriage/Domestic Partnership/Divorce
* Name Change
* Change in Income
* Loss of Health Insurance Coverage
* Change in Family Members (Add, Remove)
* Address Change
* Change in Jail/Prison status
* Change of Citizenship or Immigration Status
* Change in Employer or Employer’s Insurance
* Disability/Blindness
* American Indian Status Change
* Change in Other Coverage

If the individual wants to update additional information, they may go to My Profile to update fields (Business Rule 5.1.1, 5.1.2) that do not affect the individual’s enrollment, eligibility or plan can be updated. If fields on My Profile potentially affect an individual’s enrollment, eligibility or plan (Business Rule 5.1.3), then it will not be editable on the application and the individual will be prompted to make a Change in Circumstance using a form.

The following current screens will be accessible to the individual for review and updates:

* Overview (landing page after logging into Individual Portal)
* My Profile (Business Rule 5.1.1, 5.1.2, 5.1.3)
* My Household and Eligibility (Business Rule 5.1.3; Proposed but may change during UI decisions are made)
* My Employer (Business Rule 5.1.4)
* My Documents (Business Rule 5.1.5)
* My Policies
* My Appeals
* My Enrollments (Business Rule 5.1.3)

Section 5.10 Data Elements, has a table with all fields that are displayed on account management and which can be changed online by the individual. If the change cannot be made online, then it will trigger the Life Status Change (ELG-005) Use Case.

### Update Record If Needed

If changes are made to My Profile directly in the User Interface screen, the data base record will be updated

### Next Steps

The following next steps may be applied:

* Send a notification to the carrier when applicable for My Profile changes
* Life Status Change Use Case (ELG-005)

# Alternate Flows

There are no Alternate Flows for the Manage Individual Information Use Case.

# Exception Flows

There are no Exception Flows for the Manage Individual Information Use Case.

# Specifications

## Business Rules

### Profile Modifiable Fields

* Data Fields on My Profile are editable
* Data include Security and Contact Information
* Security Data is not viewable to a broker or service representative

### Profile Non-modifiable Fields

* Data is read-only
* Fields include COHBE Account Number and User ID
* Data is viewable to a broker or service representative

### Life Status Change

* Data is editable
* Life Status Changes will include Household Information, Eligibility and Coverage changes
* If the individual is enrolled, changes to the data elements will trigger the life status change use case

### Employer Data

* Data is read only
* Changes to the employee participation code will be done on the employer portal
* Data is viewable by a broker or service representative

### Uploaded Documents

* Data is read only
* Data is viewable by a broker or service representative

## Process Rules

There are no process rules for the Manage Individual Information Use Case.

## Workflow

### Worklist Definitions

#### Non-Life Status Change to Profile Information

Task Name: Verify Change to My Account Information

Worklist Name: Verify Name Change

Task Type: Back Office Staff Non-Life Status Change Updates

Sort Criteria: FIFO

SLA Watch: Configured number of days from date of receipt

SLA Warning: Configured number of days from date of receipt

Escalation: At configured number of days, send email to Back Office staff supervisor

Escalation Worklist: Verify Change to My Account Information

Task Actions:

* + Review and Validate Requested Changes are not Life Status Changes
  + Scan Form with Requested Changes
  + Scanned documents become work items to be processed by Back Office Staff
  + Back Office Staff with the appropriate security role updates individual accounts for the items in their worklist
  + Send notifications based on contact preferences to inform the individual of updates
  + Continue to next task list

## UI Screen Details

### Overview Screen

The overview screen shows the Individual their enrollment progress and a complete list of circumstances (Section 2.1.4) that may trigger a change in eligibility or enrollment. Multiple circumstances maybe selected.

Modify “Overview” Screen:

* Add new categories for change in circumstances (Section 2.14)
* Marriage/Domestic Partnership/Divorce
* Name Change
* Change in Income
* Loss of Health Insurance Coverage
* Change in Family Members (Add, Remove)
* Address Change
* Change in Jail/Prison status
* Change of Citizenship or Immigration Status
* Change in Employer or Employer’s Insurance
* Disability/Blindness
* American Indian Status Change
* Change in Other Coverage

Functional details:

1. Checkbox to select circumstance is to the left of the text for each category
2. Click Make Change button to go to forms to trigger life status change

### My Profile

The My Profile screen displays the individual’s profile information. Fields that are editable do not affect the Individual’s eligibility, plans or enrollment. Some fields will not be editable because they could affect the Individual’s eligibility, plans or enrollment.

Modify “My Profile” Screen:

* Update fields for My Profile:
* Residential Address 1 and 2 will not be editable fields to be consistent with the Residential Zip Code, State and City fields
* Last Name will not be an editable field
* Gender will not be an editable field
* Date of Birth will not be an editable field
* COHBE account number will not be editable
* User ID will not be editable

### My Family Details and Eligibility

The screens are currently named My Eligibility. As part of a UI effort to determine caption names, the name of this section may change. In the Interim to help clarify what this section is, it is being called My Family Details and Eligibility (see assumption bullet 2 above). It will include Household Composition, other family details and Income. In most cases, the fields will not be editable because they will trigger a life status change. During the Life Status Change Use Case analysis, additional rules will be flushed out which may affect which fields are editable in this section.

### My Employer

Fields on this screen will not be editable and will show the Employer Participation Code if it is applicable. This is an informational screen only.

### My Documents

Individuals may view documents that were attached during the enrollment period but may not attach documents to this screen.

### My Policies

Individuals may view the policy they have selected, the policy number and the premium. Additionally, after they have been approved, they will see details for their policy that include insurance carrier, plan name, metal level, deductible, quality rating submitted date and effective date

### My Appeals

Appeals may be submitted from My Family Details and Eligibility. When the individual wants to check on the appeals, they will come to this screen. The screen will include the Category, Category Type, Reason for Appeal and Attached documents

### My Enrollments

When applications are pending from the carrier, the Individual will review the application and selected plans from this screen. The actions that may be taken on this screen are download plans, cancel enrollment and edit enrollment.

### My Bills and Payments

Currently, hCentive is not planning to keep this screen and it will be removed for future releases.

## Communications

### Imaging Requirements

User change forms sent by mail or fax will be scanned and stored in ECM.

### Form Requirements

My Profile Change forms will be developed for use in this Use Case.

### Notice Requirements

Notices will be sent to both the carrier, where applicable and individual. The sections below provide additional details for notices sent to the carrier and individual.

#### Notification to Carrier of Profile Change

Carriers will be notified of profile changes that will require the carrier to update their records if the individual is enrolled in a plan.

#### Notification to Individual of Profile Change

A notification will be sent to users via their preferred communication method for any changes to the profile that are not part of a life status change.

A notification will be sent to users when the preferred communication method is change and if the email address has been updated. The email notification will be sent to the previous email address and the new email address.

### Other Communication Requirements

There are no other communication requirements for the Manage Individual Information Use Case.

## Interfaces

### 834 Enrollment Transaction

The 834 Enrollment Transaction (ANSI X12N 834) will be sent to the carrier with the required data elements Changes may result in a change in plan or enrollment, but some changes are informational only. For example:

## Reporting

The Reporting details listed in this Use Case are not intended to be a full reference of Reporting requirements for the project. This section houses Reporting or Business Intelligence measures that are specific to this Use Case.

### User Experience

* Click data to analyze problem pages
* Linkage to CRM to understand which pages are problematic

### Business Activity

* # of life change events

### Workflow

* Average queue depth
* Number of activities processed per day

## User Security

### Sensitive Data

* Federal Tax Information can be displayed
* SSN can be displayed
* Address can be displayed

## Activity Log and Audit Trail

The Activity Log and Audit Trail details listed in this Use Case are not intended to be a full reference of Activity/Auditing requirements for the project. This section houses Reporting or Business Intelligence measures that are specific to this Use Case.

### Activity Log

* The following Activity Logs will be used for Manage Individual Information Use Case:
* Time spent viewing account
* Number of times saves rejected due to errors
* Number of times Account Management requires Contact Center / Back Office assistance
  + On-line
  + Phone

### Audit Trail

* System audit trails for all transactions will be needed.
* Who created the account, categorize specifically for back office, service representatives, brokers, and navigators.

## Data Elements

The data elements below are based on information that is on hand currently. Additional analysis will be performed for the Life Status Change Use Case and may affect the data table below.

Table : Column Definitions

|  |  |
| --- | --- |
| Column Term | Definition |
| Unverified | Indicates no State or Federal verifications have been made; the field can be changed at any time |
| Verified | Indicates the information has been verified by State and/or Federal sources. The person is not yet enrolled and enrollment period is still open (either regular or special). The field may require back office or manual verification to change the field. |
| Enrolled | The enrollment period is closed, the person is enrolled in a plan. Some items may be locked down on the screen, some may not. Indicates field may require back office or manual verification to change the field. If a field is locked down (N) and the person wants to change it, it must go through the Life Status Change process. |
| Inform Carrier | When field is changed, carrier needs to be informed of the change |
| Potential Rate Change | If the field is changeable, will there be an impact to the premium amount? |
| Potential Plan Change | If the field is changeable, will there be an impact to the plan/coverage? |

Table : Account Management Fields

|  | **Can Field be Changed online by the user?** | | | **Action:** | | | |  | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Fields**  **\* Required field** | **Unverified** | **Verified** | **Enrolled** | **Inform Carrier** | **Potential Rate Change** | **Potential Plan Change** | **Potential Life Status Change** | **Back Office Verification** | **Upload Documentation Needed** |
| **My Profile Data** | | | | | | | | | |
| First Name\* | Y | N | N | Y | N | N | N | N | Y |
| Middle Name | Y | N | N | Y | N | N | N | N | N |
| Last Name\* | Y | N | N | Y | N | N | Y | N | Y |
| Gender | Y | N | N | Y | N | N | N | N | Y |
| Date of Birth\* | Y | N | N | Y | Y | N | N | N | Y |
| COHBE Account ID \*system generated | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Unique User ID\* | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Password\* | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| Contact Preference: Email or Mail\* | Y | Y | Y | Y | N/A | N/A | N/A | N/A | N/A |
| Email | Y | Y | Y | Y | N/A | N/A | N/A | N/A | N/A |
| Residential Street Address | Y | Y | Y | Y | N | N | N | N | N |
| Residential City | Y | Y | Y | Y | N | N | N | N | N |
| Residential State | Y | N | N | Y | Y | Y | Y | N | N |
| Residential County | Y | N | N | Y | Y | Y | Y | N | N |
| Residential Zip | Y | N | N | Y | Y | Y | Y | N | N |
| Security Question 1\* | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| Security Answer 1\* | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| Security Question 2\* | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| Security Answer 2\* | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| Security Question 3\* | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| Security Answer 3\* | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| Same as Residential Address | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| Mailing Street | Y | Y | Y | Y | N | N | N | N | N |
| Mailing City | Y | Y | Y | Y | N | N | N | N | N |
| Mailing State | Y | Y | Y | Y | N | N | N | N | N |
| Mailing County | Y | Y | Y | Y | N | N | N | N | N |
| Mailing Zip | Y | Y | Y | Y | N | N | N | N | N |
| Preferred Language | Y | Y | Y | Y | N | N | N | N | N |
| Phone Number (landline) | Y | Y | Y | Y | N | N | N | N | N |
| Phone Number (cell/mobile) | Y | Y | Y | Y | N | N | N | N | N |
| Receive Email Alerts | Y | Y | Y | Y | N | N | N | N | N |
| Receive Text Alerts | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| **Family Details From My Eligibility Screen** | | | | | | | | | |
| Household Composition (Number of Members)[[1]](#footnote-1) | Y | N | N | Y | Y | Y | Y | N | N |
| Apply for Benefit | Y | N | N | Y | Y | Y | Y | N | N |
| Salutation | Y | N | N | Y | N | N | N | N | N |
| First Name | Y | N | N | Y | N | N | N | N | N |
| Middle Name | Y | N | N | Y | N | N | N | N | N |
| Last Name [[2]](#footnote-2) | Y | N | N | Y | N | N | Y | N | N |
| Date of Birth | Y | N | N | Y | Y | Y | Y | N | Y |
| Is this Member applying for coverage | Y | N | N | N | N | N | Y | N | N |
| SSN/TIN | Y | N | N | N | N | N | Y | Y | Y |
| ID Proof Type (ex: change from Rental Agreement to Utility Bill) | Y | N | N | N | N | N | N | N | N |
| Relationship to Primary Applicant (only displayed for greater than 1 household member) | Y | Y | N | Y | Y | Y | Y | N | N |
| Residential Street Address 1 | Y | Y | N | Y | Y | Y | Y | N | N |
| Residential Street Address 2 | Y | Y | N | Y | Y | Y | Y | N | N |
| Residential City | Y | Y | N | Y | N | N | Y | N | N |
| Residential State | Y | Y | N | Y | Y | Y | Y | N | N |
| Residential Zip | Y | Y | N | Y | Y | Y | Y | N | N |
| Mailing Street Address 1 | Y | Y | Y | Y | N | N | N | N | N |
| Mailing Street Address 2 | Y | Y | Y | Y | N | N | N | N | N |
| Mailing City | Y | Y | Y | Y | N | N | N | N | N |
| Mailing State | Y | Y | Y | Y | N | N | N | N | N |
| Mailing Zip | Y | Y | Y | Y | N | N | N | N | N |
| Preferred Method of Contact | Y | Y | Y | Y | N/A | N/A | N/A | N/A | N/A |
| Preferred Language | Y | Y | Y | Y | N/A | N/A | N/A | N/A | N/A |
| Phone Number (landline) | Y | Y | Y | Y | N/A | N/A | N/A | N/A | N/A |
| Cell Phone Number | Y | Y | Y | Y | N/A | N/A | N/A | N/A | N/A |
| Receive Email Alerts | Y | Y | Y | Y | N/A | N/A | N/A | N/A | N/A |
| Receive Text Alerts | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| American Indian/ Native Alaskan Status | Y | N | N | Y | Y | Y | Y | N | Y |
| Incarceration Status | Y | N | N | Y | Y | Y | Y | Y | Y |
| Citizenship/eligible immigration status (need to add a field?) | Y | N | N | Y | Y | Y | Y | Y | Y |
| State Resident | Y | N | N | Y | Y | Y | Y | N | N |
| Gender | Y | N | N | Y | N | Y | N | N | N |
| Is this member employed and has access to group health insurance through his/her employer | Y | Y | Y | Y | Y | Y | Y | N | N |
| Smoker | Y | Y | N | N | Y | Y | N | N | N |
| Disability/Blindness status | Y | Y | N | Y | N | Y | N[[3]](#footnote-3) | N | N |
| Pregnancy Status | Y | Y | Y | Y | N | N | Y | N | N[[4]](#footnote-4) |
| Income Details from My Eligibility | | | | | | | | | |
| File Taxes Last Year? | Y | N | N | N | N | N | N | N | N |
| Expect Income to be Different this year? (requires yes to move to additional fields) | Y | N | N | N | N | N | Y | N | N |
| Is there Family Income? | Y | Y | N | N | Y | N | Y | N | N |
| Does Income Come from Job | Y | Y | N | N | Y | N | Y | N | N |
| Does member have income from a different source | Y | Y | N | N | Y | N | Y | N | N |
| Does member have any adjustments | Y | Y | N | N | Y | N | Y | N | N |
| How often do you get paid | Y | Y | N | N | Y | N | Y | N | N |
| How much is the salary for this period | Y | Y | N | N | N | N | Y | N | Y\N |
| Income from other sources | Y | Y | N | N | N | N | Y | N | N |
| Adjustments | Y | Y | N | N | N | N | Y | N | N |
| **Review Declare and File from My Eligibility** | | | | | | | | | |
| Review Details (fields are displayed from previously entered fields and are editable) | Y | Y | N | N | N/A | N/A | N | N/A | N/A |
| **Document Submission from My Eligibility** | | | | | | | | | |
| Select Document Category | Y | N | N | N | N/A | N/A | N/A | N/A | N/A |
| Select Document Type | Y | N | N | N | N/A | N/A | N/A | N/A | N/A |
| Download | Y | N | N | N | N/A | N/A | N/A | N/A | N/A |
| **Eligibility Results on My Eligibility** | | | | | | | | | |
| Edit Eligibility Button | Y | Y | N | N | N/A | N/A | N/A | N/A | N/A |
| Submit Appeal Button | Y | Y | N | N | N/A | N/A | N/A | N/A | N/A |
| Find a Plan Button | Y | Y | N | N | N/A | N/A | N/A | N/A | N/A |
| Eligibility Results Text | N | N | N | N | N/A | N/A | N/A | N/A | N/A |
| **My Employer** | | | | | | | | | |
| Employer Participation Code | Y | Y | N | N | Y | Y | Y | N | N |
| Employer ID | Y | Y | N | N | Y | Y | Y | N | N |
| Employer Name | Y | Y | N | N | Y | Y | Y | N | N |
| Enrollment ID | Y | Y | N | N | Y | Y | Y | N | N |
| Enrollment Status | Y | Y | N | N | Y | Y | Y | N | N |
| Action | Y | Y | N | N | Y | Y | Y | N | N |
| **My Documents** | | | | | | | | | |
| Select Document Category | Y | N | N | N | N/A | N/A | N/A | N/A | N/A |
| Select Document Type | Y | N | N | N | N/A | N/A | N/A | N/A | N/A |
| Download (only viewed if document category and document type are selected from drop down) | Y | N | N | N | N/A | N/A | N/A | N/A | N/A |
| **My Policies** | | | | | | | | | |
| Policy | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Policy Number | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Policy Premium | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| **My Appeals** | | | | | | | | | |
| Category | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Category Type | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Reason for Appeal | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Document Name | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| **My Enrollments[[5]](#footnote-5)** | | | | | | | | | |
| Application Number | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Primary Contact Name | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Submitted On | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Effective Date | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Premium | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Insurance Carrier | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Plan Name | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Metal | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Annual Deductible | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Quality Rating | N | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Download Button | Y | Y | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Cancel Enrollment Button | Y | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| Edit Enrollment Button | Y | N | N | N/A | N/A | N/A | N/A | N/A | N/A |
| **My Bills and Payment** | | | | | | | | | |
| TBD | Y | Y | Y | N/A | N/A | N/A | N/A | N/A | N/A |
| **Misc Fields Not Covered Above** | | | | | | | | | |
| Other coverage loss | N | N | N | Y | Y | Y | Y | N | N |
| Marital Status (covered as part of relationship to) | See change in number of members / household composition | | | | | | | | |
| Update APTC inform carriers | See change of income | | | | | | | | |
| QHP violates contract to the enrollee | N | N | N | Y | Y | Y | Y | N | N |

# Future Release Notes

There are no Future Release Notes for the Manage Individual Information Use Case

# Appendix A – Glossary

| Term | Definition |
| --- | --- |
| ESI | Employer Sponsored Insurance |
| SMS | Short Message Service --- text messaging |
| SHOP | Small Employers Health Options Program |
| MDM | Master Data Management database at the State |
| ECM | Enterprise Content Management |

1. If adding family members, all fields in My Eligibility are open as if it were a first time enrollment. [↑](#footnote-ref-1)
2. If name change in My Eligibility is for account owner, reflect changes in area on the My Profile screens as well. [↑](#footnote-ref-2)
3. Becoming disabled is not listed in the CFR as a reason for special enrollment period. However, becoming disabled may qualify the person for Medicaid and therefore should be reported. [↑](#footnote-ref-3)
4. Medicaid requires documentation from a health care provider as to the due date and number of babies expected. Does COHBE want to follow suit? [↑](#footnote-ref-4)
5. My Enrollments has display information that has button options. Choosing a button may affect other areas of eligibility. Those changes are reflected above. [↑](#footnote-ref-5)