NY Health Exchange Blueprint Summary Section 9.6.1 - User Story Descriptions, October 26, 2012
(Supplemental Information for the 9.6.1 - NY-HX Trace Full 101212.xlsx document)

RTC ID	Summary	Description	Filed Against
167	PM.G.1.Design PM System | Search Plan Screens	As an Exchange Administrator, I want to ensure that Search Plan Screens are developed. Search Plan Screens	NY-HX (CM)/Plan Management
169	PM.G.1.Design PM System | Create the Conceptual and Logical Plan Management Data Models	As an Exchange Administrator, I want to ensure that conceptual and logical subject area data modeling for Plan Management data elements is performed.	NY-HX (CM)/Plan Management
174	PM.G.1.Design PM System | Create the Plan Management Physical Data Model	As the Plan Management Sprint team, I want to create the data model so that I can accurately store plan information in the Exchange.(Technical Story)	NY-HX (CM)/Plan Management
215	PM.G.1.Design PM System | Technical Story: Compare FFE data model to the hCentive	As the Exchange Administrator, I want to ensure that the FFE data model is compared to the hCentive data model.	NY-HX (CM)/Plan Management
217	PM.G.1Design PM System | Create the Plan Management Conceptual and Logical Data Models to Inform the Later Physical Model	As the Exchange Administrator, I want to ensure that the Plan Management Conceptual and Logical Data Models are created.	NY-HX (CM)/Plan Management
228	PM.G.1.Design PM System | High Level PM Model	As the Exchange Administrator, I want to see diagramed the high level process of how PM receives data and to where that data is output so that our high level flow is documented for future development/developers.	NY-HX (CM)/Plan Management

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271	PM.G.1.Design PM System | Proof of Concept to received CHIP and Medicaid data	As a developer, I want to set up a proof of concept to receive flat files or .csv files through ESB, transform the data, and persist it in the database so that I can define a process for receiving plan data from Medicaid and CHIP. 1. Familiarity & accessibility of environment 2. Retrieve the File location via Web Service 3. Define the workflow through the ESB 4. Translate the file using data transformation tool 5. Validation 6. Process through Informatica 7. Delegate to another web service 8. Ensure that it persists in the database	NY-HX (CM)/Plan Management
273	PM.G.4.Initial Load MMC | Medicaid Template	As a developer, I need to finalize an excel-based data template which can be populated by the state so that I can get CHIP plan data in a manner that the Exchange can consume. 1. Wait to receive confirmation on the template for MMC plans 2. Joe will provide the sample data by Tue 8-21 approx. 3. Analyze the data 4. Make sure with DA team that we are capturing the right things 5. Map the data elements to our data model 6. Decide the data formatting guidelines	NY-HX (CM)/Plan Management

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275	PM.G.1.Design PM System | POC Technical Requirements Gathering	As a developer, I want to do technical requirements gathering for the proof of concept to receive plan data from various sources (either as a web service or a csv or a flat file) through ESB (Intel ESG) into the Exchange, transform the data, validate it and persist in the database so that I can define a process for receiving and storing plan data in the Exchange. 1. Meet with Dan Hallenbeck for Intel Expressway 2. Conceptualize at a high level 3. Scope out/stub out sub-steps 4. Look at sample file & process it to prove the concept.	NY-HX (CM)/Plan Management
276	PM.G.1.Design PM System | IDA Tool Data Modeling	As a data architect, I want to use the IDA Infosphere Data Architecture tool to do the actual data modeling for Plan Management by loading the data elements into the IDA tool to diagrammatically create the data model from the textual physical data model supplied in Excel.	NY-HX (CM)/Plan Management
278	PM.G.1.Design PM System | IDA Data Modeling Attributes, Descriptions, and Conventions	As a data architect I want to continue to use the IDA Infosphere Data Architecture tool to do the data modeling for Plan Management. 1. Need to put the descriptions into the tool 2. Adding attributes manually as well as the physical names 3. Define conventions & standards for tables & table columns	NY-HX (CM)/Plan Management
279	PM.G.1.Design PM System | Audit Data Model	As an application designer, I want to audit the data in the data model so that we can have more tables for auditing purposes. 1. This was begun in Sprint 3. 2. Already defined a flow between the staging and the 3. Review from Larry & Zach 4. Incorporate the comments if any	NY-HX (CM)/Plan Management

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280	PM.G.8.Initial Load Quality | QARR Process Diagram	As the development team, I want to work with the Technical Writer to create a QARR Process Diagram - Including initial data load and how updates will be loaded as well. 1. Diagram the way that NY-HX will receive Quality data from QARR 2. Receive SME input 3. Review with QARR and DOH 4. Adjust process 5. Confirm/Finalize	NY-HX (CM)/Plan Management
284	PM.G.1.Design PM System | Simplified Data Model	As the Technical Writer, I want to create a simplified data model to share with product owners and prepare for the Fed review in September. 1. Add CHIP rates table/square up draft with working Data Model 2. Create boilerplate text in tables 3. Get content validation 4. Update 5. Review with SMEs 6. Decide on look/feel of document (CSC QA) 7. Final updates 8. Final acceptance	NY-HX (CM)/Plan Management
285	PM.G.1.Design PM System | Data Flow Diagrams	As the Technical Writer, I want to create a a data flow diagram / explanation to attach to the simplified data model that product owners review. 1. Draft the process in PPT including all process flows - plus PNDS & SERFF 2. Share with Larry & Kalyan for input 3. Incorporate content 4. Review again 5. Update per feedback 6. Final acceptance	NY-HX (CM)/Plan Management

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289	PM.G.1.Design PM System | Technical Rules	As the Development Team, I want to record the the technical rules for validating the data received from multiples data sources so that the data is more accurate and easily transformable in NY-HX. 1. Look at tables in the data model to look at how the data is distributed 2. Draft the technical data validation rules 3. Make sure that the rules are consistent throughout the table structure 4. Review with the testing & sprint team (+DOH) 5. Update the document with the feedback & review comments 6. Publish the document	NY-HX (CM)/Plan Management
294	PM.G.1.Design PM System | Review WSDL	As an application designer, I want to review the WSDL from SERFF. 1. Review the XSD and the WSDL received from SERFF. 2. Send the questions or concerns to the SERFF team and get them clarified	NY-HX (CM)/Plan Management
327	PM.G.1.Design PM System | Exchange Regulator Screens Portal	As an Exchange Administrator, I want to ensure that Exchange Regulator Screens Portal is developed.	NY-HX (CM)/Plan Management
335	PM.C.1.Pull Provider Network | Receive PNDS Data	As the Exchange Administrator, I want to receive PNDS data so that I can make plan information available on the Exchange.	NY-HX (CM)/Plan Management
336	PM.C.1.Pull Provider Network | Read, Parse & Translate PNDS Data	As an Exchange Administrator, I want to ensure that PNDS Data is Read, Parsed & Translated.	NY-HX (CM)/Plan Management
337	PM.G.1.Design PM System | Process PNDS Data	As the Exchange Administrator, I want the PNDS data to be processed so that it is stored properly within the Plan Management area of the Exchange.	NY-HX (CM)/Plan Management
338	PM.C.1.Pull Provider Network | Map, Validate & Persist PNDS Data	As the Exchange Operator, I want the PNDS data to be mapped, validated and persisted in the database.	NY-HX (CM)/Plan Management

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340	PM.G.1.Design PM System | Business Requirements Document Updates	As the Exchange Administrator I want to ensure that the Business Requirements lead the design of the plan management area of the Exchange system.	NY-HX (CM)/Plan Management
342	PM.G.1.Design PM System | Business Rules and Continued Iterative Business Requirements Gathering for PNDS Data	As an Exchange Administrator, I want to ensure that Business Rules & Continued Iterative Business Requirements Gathering for PNDS Data is performed.	NY-HX (CM)/Plan Management
343	PM.G.8.Initial Load Quality | Receive Quality Data	As the Exchange Operator, I want receive Quality Data on the Exchange so that I can display that plan information on the Exchange.	NY-HX (CM)/Plan Management
344	PM.D.1.Receive Quality Data | Read, Parse & Translate Quality Data	As the Exchange Operator, I want to read, parse and translate the Quality data so that it can be displayed properly on The Exchange.	NY-HX (CM)/Plan Management
345	PM.D.1.Receive Quality Data | Process Quality Data	As the Exchange Operator, I want the Quality data processed so that the plan information can be stored properly on the Exchange.	NY-HX (CM)/Plan Management
346	PM.G.8.Initial Load Quality | Map, Validate, and Persist Quality Data	As the Exchange Operator, I want the multi-state data to be mapped, validated and persisted in the database so that it can be stored properly in the Exchange.	NY-HX (CM)/Plan Management
348	PM.G.1.Design PM System | Complete Roles, Cookbooks, and Architecture Work Supporting Design of PM	As the Exchange Administrator, I want the Roles, Cookbooks, & Architecture Work done so that the framework for the Plan Management area of the Exchange System is built properly.	NY-HX (CM)/Plan Management
350	PM.G.1.Design PM System | Business Rules and Continued Iterative Business Requirements Gathering for Quality Data	As the Exchange Operator, I want to record the business rules so that I can make sure that the Business Rules implemented in plan management processes drive the design of the plan Management area of the Exchange system.	NY-HX (CM)/Plan Management

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362	PM.G.6.Initial Load BHP | Validate Mapped BHP Data	As a developer, I want to validate the mapped data so that I can ensure that the data received is in conformance with the functional rules. Assume that validation rules are the same across all DOH-received data. 1. Verify if a data stops the existence of another data element 2. Some rules may invalidate the existence of some data dependent on the if sentence subject Implements G6 & B3 from The Blue Sheet	NY-HX (CM)/Plan Management
363	PM.G.6.Initial Load BHP | Persist Validated BHP Data	As a developer, I want to persist (store & make available) the validated data so that I can make the plan data available in the Exchange. (Technical Story) Assume that the mapping files are already defined. 1. Write mapping .xml files 2. Identify the relationships between tables (primary keys, foreign keys etc...) 3. Define the mapping files (tables) (this is coding) Note: Using Object Relational Mapping (ORM) Framework e.g., "Hibernate," (Pulling data using Java objects) Implements G6 & B3 from The Blue Sheet	NY-HX (CM)/Plan Management

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364	PM.G.6.Initial Load BHP | Receive data from DOH for new and updated BHP	As an Exchange Operator, I want to receive data from DOH for new and updated Basic Health Plans (BHP) for data elements including but not limited to: benefits/cost sharing, covered services, service area, rates, accreditation, formulary, insurer data so that I can make the BHP plan data available on the Exchange. 1. Receive the file from DOH via FTP (assumption) 2. Process the data 3. Load the data into a staging table 4. Parse, validate and load the data Maps to Blue Sheet: G6 & B3	NY-HX (CM)/Plan Management
365	PM.G.6.Initial Load BHP | Receive BHP data	As a developer, I want to receive BHP data from DOH via FTP so that I can make plans available in the Exchange. (Technical Story) 1. Assume that the script is established from prior Medicaid file received Implements G6 & B3	NY-HX (CM)/Plan Management
366	PM.G.6.Initial Load BHP | Process BHP data	As a developer, I want to process the BHP data received via FTP from DOH and load it into a staging table so that I can keep track of what has been received from DOH. Open Questions: What is the file format? What columns do we have to read? Assume that the same process will be used as when the Medicaid file was received. Implements G6 & B3 on the Blue Sheet.	NY-HX (CM)/Plan Management

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367	PM.G.6.Initial Load BHP | Read, parse, and translate BHP data	As a developer, I want to read the BHP data from the staging table, parse and translate the BHP data that needs to be mapped to the data elements in Exchange so that I can ignore unnecessary data received from DOH. (Technical Story) 1. Assume that some work (minus elements) can be reused from Medicaid work done prior 2. Edit the data as per defined criteria. 3. Translate codes 4. Decide coded values (on our side?) (Data modeling does not fully define it ahead of time.) Implements G6 & B3 on The Blue Sheet.	NY-HX (CM)/Plan Management
368	PM.G.6.Initial Load BHP | Map the Translated BHP Data Elements	As a developer, I want to map the translated BHP data elements in Exchange so that I can match the data elements correctly in the destination database. Assume that we can reuse the elements mapped from Medicaid plans. Find out the differences between Medicaid & CHIP plans and map the unique things. Implements G6 & B3 on The Blue Sheet	NY-HX (CM)/Plan Management
369	PM.G.5.Initial Load CHIP | Define a Parser to parse the CHIP data using Informatica	As an Exchange Administrator, I want to ensure that a Parser to parse the CHIP data using Informatica is Defined. Define a parser to parse the CHIP data using Informatica - STEP ONE 1. define a parser that will take the excel file and parse it	NY-HX (CM)/Plan Management
370	PM.G.5.Initial Load CHIP | Transform the CHIP data using Informatica	As the Exchange Administrator, I want to ensure that the CHIP data is transformed using Informatica. STEP TWO	NY-HX (CM)/Plan Management

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371	PM.G.5.Initial Load CHIP | Validate the data against the technical and business rules	As an Exchange Administrator, I want to ensure that the data is Validated against the technical and business rules (Validation Framework). 1. define the XSD and the WSDL for the request and the response 2. define the validation error codes and messages 3. generate the web services components for server 4. implement the services to perform the validations	NY-HX (CM)/Plan Management
375	PM.G.1.Design PM System | BRD Updates & Federal Gateway Review Deliverables	As the Exchange Administrator, I want to ensure that BRD Updates & Federal Gateway Review Deliverables are completed.	NY-HX (CM)/Plan Management
376	PM.G.1.Design PM System | Rational Configuration and Sprint documentation supporting development	As the Exchange Administrator, I want to ensure that Rational Configuration and Sprint documentation supporting development is performed.	NY-HX (CM)/Plan Management
384	PM.G.1.Design PM System | Review Data Model Sprint 3	As the Exchange Administrator, I want to ensure that the Data Model is Reviewed in Sprint 3.	NY-HX (CM)/Plan Management
385	PM.G.3.Initial Load QHP | Conceptualize Screen Development	As the Exchange Operator, I want to see the concept for the screens that Exchange Operators will use to look at the data.	NY-HX (CM)/Plan Management
386	PM.G.1.Design PM System | Develop Exchange Operators Screens Prototype	As the Exchange Administrator, I want to ensure thatExchange Operators Screens Prototypes are Developed.	NY-HX (CM)/Plan Management
387	PM.G.1.Design PM System | Develop Screens for Insurers Prototype	As the Exchange Administrator, I want to ensure that the prototype for interface screens for Insurers are developed.	NY-HX (CM)/Plan Management
388	PM.G.4.Initial Load MMC | Review Medicaid Files	As the Exchange Administrator, I want to ensure that Medicaid Files with hCentive/ review Medicaid Files are compared.	NY-HX (CM)/Plan Management
389	PM.G.4.Initial Load MMC | Medicaid Template Design	As the Exchange Administrator, I want to ensure that the Medicaid Template Designed.	NY-HX (CM)/Plan Management
391	PM.G.5.Initial Load CHIP | Review CHIP Files	As the Exchange Administrator, I want to ensure that the CHIP Files are reviewed.	NY-HX (CM)/Plan Management

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392	PM.G.5.Initial Load CHIP | Design CHIP Template	As a developer, I need to finalize an excel-based data template which can be populated by the state so that I can get CHIP plan data in a manner that the Exchange can consume.	NY-HX (CM)/Plan Management
393	PM.D.1.Receive Quality Data | Identify Quality Data Elements	As the Exchange Administrator, I want to ensure that the Quality Data Elements are identified.	NY-HX (CM)/Plan Management
395	PM.G.1Design PM System | Define Role Based Security for Screens	As the Exchange Administrator, I want to ensure that Role Based Security for Screens is defined.	NY-HX (CM)/Plan Management
423	PM.G.3.Initial Load QHP | Reconcile the NY-HX Data Dictionary	As the Exchange Administrator, I want to ensure that the NY-HX Data Dictionary is Reconciled.	NY-HX (CM)/Plan Management
425	PM.D.2.Store Quality Data | Develop code using JPA entities to store the data into the database	As the Exchange Administrator, I want to ensure that code using JPA entities to store the data into the database is developed.	NY-HX (CM)/Plan Management
428	EE.B.2g.Estabish User Role I Identify Type of User	As a User I would like to identify the type of consumer I am in order to see what options are available. (i.e. individual, employee, employer)	NY-HX (CM)/Individual
429	EE.B.1.Create User account | Select type of user	As an Exchange User, I would like to select the type of user I am and enter my user name and password so I may begin navigating through the Exchange. (i.e. individual, employee, employer, Broker, Assistor)	NY-HX (CM)/Individual
430	OV.A.1.User Portal via Multiple Browers l Access the Exchange via Multiple Browsers	As an Exchange User, I would like to be able to access the NYHX via multiple browsers (Safari, Goggle Chrome etc…) so can effectively navigate the NYHX.	NY-HX (CM)/Individual
431	EE.A.6.Access NYHX via alternative devices	As an Exchange User, I would like to be able to access the NYHX via devices (smart phones, pad) so I can effectively navigate the NYHX.	NY-HX (CM)/Individual
432	EE.A.6.NYHX provide persistant features | Ability to chat with customer rep	As a consumer who is logged in with an account, I want to be able to chat with a customer service representative so that I can have my questions answered in real-time.	NY-HX (CM)/Individual
433	EE.A.6.NYHX provide persistant features | Send email to NYHX while not logged in	As a consumer who is not logged into an account, I would like the ability to contact the exchange via email so I can ask questions without calling the contact center.	NY-HX (CM)/Individual

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434	Provide Information in Simple Understandable Terms | Show user current news etc	As an exchange User, I would like to be presented with current news and information regarding the exchange. (e.g. open enrollment is Oct 15)	NY-HX (CM)/Individual
435	EE.A.4.Shop Anonymously l Income Specific List of Available Plans	As a Consumer I would like to enter my zip, number of people in household, and select my income range in order to obtain a income specific list of available full price, subsidized, CHIP, Medicaid plans anonymously	NY-HX (CM)/Individual
436	EE.A.4.Shop Anonymously l Filter Results Returned	As a consumer I would like to filter the results returned from anonymous shopping with the filter criteria used in full screening in order to narrow the results.	NY-HX (CM)/Individual
437	EE.A.4.Shop Anonymously l Save Selected Filters and Choices	As a consumer I would like to temporarily save selected plans based on my basic screening criteria without creating an account to a favorites list in order to facilitate plan comparisons after changing filtering criteria so I can effectively choose a plan	NY-HX (CM)/Individual
439	NYHX provide understandable information | User review of NYHX security and privacy policies	As a consumer I would like to be able to access the Exchange site policies.	NY-HX (CM)/Individual
440	CS.G.1.a.Self Help Static l Consumer Access of Site Map	As a consumer, I would like the ability to access a site map to assist me with navigating the site.	NY-HX (CM)/Individual
441	OV.A2.Access Exchange via Multiple Languages| Change Language of Web Site	As a Consumer, I want to be able change the language of the website so that I can view the exchange website in my preferred language. (Phase 1: Eng/Sp with tag lines in other languages; Phase 2: add other languages as per CMS guidance)	NY-HX (CM)/Individual
442	OVR.B.1-10.Fed and State Accessibility Requirements l Albility To Adjust Font Size	As a consumer, I want to be able to change the font size of the WebPages so that I can view the pages in a size that is suitable for my vision.	NY-HX (CM)/Individual
443	EE.A.6.NYHX provide persistant features | Locate an assistor or navigator	As a Consumer, I want to be able to locate an assistor/navigator close to me so that I can get help in person.	NY-HX (CM)/Individual
444	EE.A.6.NYHX provide persistant features | Search NYHX by keyword	As a Consumer, I want to be able to search the NYHX website by keyword so that I can get more information about a specific topic.	NY-HX (CM)/Individual

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445	CS.G.1.Self Help Static l Access Glossary of Terms	As a Consumer, I want to look up terms specific to NYHX and insurance affordability programs so that I can understand the content of the NYHX website.	NY-HX (CM)/Individual
446	EE.A.6.NYHX provide persistant features | Download documents	As a consumer, I want to be able to download any downloadable document from the NYHX website so that I can complete applications by mail or have hard copies of informative documents	NY-HX (CM)/Individual
448	EE.A.4.Shop Anonymously l Design of Secondary PageWith Anonymous Shopping Focus	As a user interface designer, I want to design the secondary page so that the focus is on anonymous shopping so that a user can browse plans without setting up an account.	NY-HX (CM)/Individual
449	EE.A.1-5.General User Options l Screening Tool	As a user interface designer, I want to design the landing page to have links to secondary pages for account sign-in/set-up, screening tool, information about the exchange (about us).	NY-HX (CM)/Individual
451	OVR.A.3.Persistent Features (Static Pages) | Home Page Persistent Features	As a user iInterface designer, I want to group customer service/persistent features i.e., account sign-in/set-up, screening tool, locate a navigator or assistor, information about the exchange(about us) together on the homepage and exchange website so that it is easy for a consumer to navigate the website.	NY-HX (CM)/Individual
452	OVR.B.1-10.Fed and State Acessibility Requirements l ADA Compliance	As a Developer, I want to code the NYHX so that it is compliant with the Americans with Disabilities Act. (This includes coding that will support assistive devices and other approaches to fully comply with 508 C3and WACOG standards for ADA compliance.)	NY-HX (CM)/Individual
453	OVR.B.1-10.Log Access to the Website l Analysis of NYHX site usage	As an exchange administrator, I want to be able to analyze the utilization of the exchange so that I can identify opportunities to improve the exchange website (Google analytics).	NY-HX (CM)/Individual
454	EE.B.1.Create User account | Create Full User Account	As a consumer, I would like to create an account so that I can begin to explore my health insurance options. Inclusive of email address, user id password, and security questions.	NY-HX (CM)/Individual
455	EE.B.1.Create User account | Authenticate account	As a consumer, I need to authenticate my acct before I can activate my account (e.g. email notification) so that I can access my account on the Exchange.	NY-HX (CM)/Individual

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456	EE.B.1.Create User Account | Reminder Question & Answers	As an account holder, I need to provide answers to my reminder questions so I can reset my password in the exchange.	NY-HX (CM)/Individual
457	EE.A.4.Shop Anonymously l Select Type of User	As an anonymous shopper, I would like to select the type of user I am so I can begin shopping for a plan	NY-HX (CM)/Individual
458	EE.F.1a.NYHX user account management | Account info update	As an exchange user, I would like to update my account information (contact info, email, phone etc.) information in order to keep my account current.	NY-HX (CM)/Individual
459	EE.B.10.Designate an authorized rep | Authorized rep restriction	As an exchange user, I would like to restrict the authorized representative use of my account as a protective measure.	NY-HX (CM)/Individual
460	EE.B.1.Create User account | Open ID use	As user I would like to use my "open ID" to authenticate my account so I can access the Exchange.	NY-HX (CM)/Individual
461	EE.B.2f.Identity proof account creators | Assistor identity confirmation	As an assistor (e.g. authorized rep, FE, Navs) I need to be able to confirm my identity to obtain a logon and password that gives me access to the Exchange and allows me to assist in completing the application process on a consumer's behalf.	NY-HX (CM)/Individual
462	EE.F.1.User deletes all account records | User data removal	As an exchange I would like to remove data that has been entered by the consumer when the consumer has indicated that they do not want that information retained by the system to comply with the HITECH rule.	NY-HX (CM)/Individual
463	OVR.B.1-10. Store All Data Required by the Feds l HITECH Data Retention	As an exchange I need to retain only the minimum data that is necessary to comply with the HITECH rule.	NY-HX (CM)/Individual
464	EE.B.8.Correct information in application | Update account with turbo tax	As an applicant, I would like systems I use (turbo tax) to update my account within the Exchange.	NY-HX (CM)/Individual
465	EE.B.1.Create User account | Link applicant accounts with assistor accounts	As an assistor I want to link applicant accounts to my account credentials so I can assist the user.	NY-HX (CM)/Individual
466	EE.B.1a.Consumer Consent l Consent to Understanding Privacy Rights	As a consumer, I would like to consent to my understanding of my privacy rights before the exchange starts gathering my personal identifying information.	NY-HX (CM)/Individual
467	EE.A.6.NYHX provide persistant features | Download privacy policy	As a consumer, I would like to be able to download the privacy policy so I can understand how my personal information will be used as part of the application process.	NY-HX (CM)/Individual

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468	EE.B.2f.Identity Proof | Send to Identify Proofing Hub	As the exchange , I want to send the consumer contact information to the identity proofing hub so I can confirm the identity of the consumer .	NY-HX (CM)/Individual
469	EE.B.1.Create User account | Provide Contact Information	As a consumer, I want to provide my contact information inclusive of; mailing address, legal address, telephone preferred method of contact and secondary contacts I can continue with the application process.	NY-HX (CM)/Individual
470	EE.B.10.Designate an authorized rep | designate an authorized rep	As a consumer, I would like to designate someone as an authorized representative who can act on my behalf so I can proceed with the application process.	NY-HX (CM)/Individual
471	EE.B.15.Ping and Store Multiple Sources of Data | Submit For Address Standarization	As a Developer, I want to submit the address to standardization process and give the consumer the option to pick the standardized address.	NY-HX (CM)/Individual
472	EE.B.3.Apply-Determine Eligibility | Attest To Intent To Live In NYS	As a consumer I want to attest to the intent that I will live in New York State and indicate when I think I will establish residency so I can move forward in the process.	NY-HX (CM)/Individual
473	EE.B.3.Apply-Determine Eligibility | Enter County of Residence	As the exchange I want the consumer to enter their county of residence so I can move forward.	NY-HX (CM)/Individual
474	EE.B.3.Apply-Determine Eligbility l Attest to Living in a Specific County (Victims of Domestic Violence)	As a consumer I want to attest that I live in a specific state and county. (Victims of domestic violence) so I can move forward in the process	NY-HX (CM)/Individual
475	EE.B.11.Multiple Lanuage Support | Idenitfy Preferred Written and Spoken Language	As a consumer, I would like to identify my preferred written and spoken language so I can proceed with the application process.	NY-HX (CM)/Individual
476	EE.B.10.Designate an authorized rep | Identify self as authorized rep	As a consumer, I want to advise that I am an authorized representative applying for health coverage for someone else so I can proceed with the application process.	NY-HX (CM)/Individual
477	EE.B.3.Apply-Determine Eligibility | Request for Help Paying for Health Ins	As a consumer, I would like to advise that I would like help paying for my health coverage for members of my household.	NY-HX (CM)/Individual
478	EE.B.3.Apply-Determine Eligibility | Enter HH Member information	As a consumer, I would like to provide my and/or my household names, address, DOBs, and SSNs or alternative Ids (RRA) so that I may proceed with the application process.	NY-HX (CM)/Individual

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479	EE.B.3.Apply-Determine Eligibility | No SSN and Need Assistance Applying For One	As a consumer I want to indicate I have no SSN and receive assistance applying for a SSN so I can move forward in the process	NY-HX (CM)/Individual
480	EE.B.3.Apply-Determine Eligibility | Indicate Ineligible for SSN	As a consumer I want to indicate that I am ineligible for an SSN so I can move forward in the process	NY-HX (CM)/Individual
481	EE.B2.Verify Eligibility l Provide Tax Id as a Prucol Member	As a consumer I want to enter my Tax ID so I can move forward in the process as a PRUCOL member so I can move forward in the enrollment process.	NY-HX (CM)/Individual
482	EE.B.13.Alaskan Native /Native American| Provide Tribal Documentation	As a consumer I want to provide tribal documentation so I can move forward in the process	NY-HX (CM)/Individual
483	EE.B.3.Determine Eligibility | Identify Relationship of Houshold Members to Each Other	As a consumer, I need to identify the relationship of the other people in my household to each other so I may proceed with the application process.	NY-HX (CM)/Individual
488	EE.B.3c.Notify Exchange of Other Insurance | Determine Access to TPL and If Waiting Period Imposed	As the exchange I must determine if the individual has access to Third Party Health Insurance (TPHI) to determine if there is a waiting period imposed by the employer before the individual may enroll	NY-HX (CM)/Individual
489	EE.B.3c.Notify Exchange of Other Insurance | Determine Access to TPL and Medicaid Eligibility	As the exchange I must determine if the individual has access to Third Party Health Insurance (TPHI) to determine if the applicant is eligible for Medicaid and must enroll in TPHI.	NY-HX (CM)/Individual
490	EE.B.3c.Other Insurance | Determine If Consumer Has TPL and Considering Coverage	As the exchange I must determine if the individual in enrolled in TPHI to determine if the individual is considering purchasing different coverage through the exchange.	NY-HX (CM)/Individual
491	EE.B.3c.Notify Exchange of Other Insurance| Determine if TPHI is MEC	As the exchange I must determine if the individual in enrolled in TPHI to determine if the insurance is considered MEC.	NY-HX (CM)/Individual
492	EE.B.3c.Notify Exchnage of Other Insurance | Determine if Adult Child is Aging Out	As the exchange I must determine if the individual is enrolled in TPHI to determine if the applicant is an adult child aging out of a parent's policy and is in need of coverage through the exchange.	NY-HX (CM)/Individual
493	EE.B.3c.Notify Exchange of Other Insurance | Determine TPHI and If Applying for HH Members	As the exchange I must determine if the individual is enrolled in TPHI to determine if the user is applying for their children or other family members	NY-HX (CM)/Individual

RTC ID	Summary	Description	Filed Against
494	EE.B.3c.Notify Exchange of Other Insurance | Determine TPHI and If Family Coverage is Available	As the exchange I must determine if the individual in enrolled in TPHI to determine if the applicant is a child or other family member, whether family coverage is available.	NY-HX (CM)/Individual
495	EE.B.3c.Notify Exchange of Other Insurance | Determine if THPI is Affordable and MEC	As the exchange I must determine if the individual has access to or is enrolled in TPHI to determine if the coverage is considered affordable to determine if the coverage is considered MEC.	NY-HX (CM)/Individual
498	EE.B.3c.Notify Exchange of Other Insurance| Determine if ESHI and Eligible for Medicaid	As the exchange I must determine if the individual has access to employer sponsored health insurance (ESHI) to determine if the applicant is eligible for Medicaid and must remain enrolled in ESHI.	NY-HX (CM)/Individual
499	EE.B.3c.Notify Exchange of Other Insurance l Determine if ESHI and Purchasing Insurance Through Exchange	As the Exchange I must determine if the individual is enrolled in Employer Sponsored Health Insurance (ESHI) to determine if the individual is considering purchasing different coverage through the Exchange	NY-HX (CM)/Individual
500	EE.B.3c.Notify Exchange of Other Insurance l Determine If Enroll in ESHI and If Insurance is Consider MEC	As the exchange I must determine if the individual is enrolled in Employer Sponsored Health Insurance (ESHI) to determine if the insurance is considered MEC	NY-HX (CM)/Individual
501	EE.B..3c.Notify Exchange of Other Insurance l Determine if ESHI and aging out adult child	As the exchange I must determine if the individual is enrolled in Employer Sponsored Health Insurance (ESHI) to determine if the applicant is an adult child aging out of a parent's policy	NY-HX (CM)/Individual
502	EE.B.3c.Notify Exchange of Other Insurance l Determine if ESHI and Eligible for Medicaid Must Enroll in TPHI	As the Exchange I must determine if the individual is enrolled in Employer Sponsored Health Insurance (ESHI) to determine if the applicant TPHI is eligible for Medicaid, they must first enroll in TPHI	NY-HX (CM)/Individual
503	EE.B.3c.Notify Exchange of Other Insurance l Determine if ESHI and Enrolling HH Members	As the exchange I must determine if the individual is enrolled in Employer Sponsored Health Insurance (ESHI) to determine if the user is applying for their children or other family members	NY-HX (CM)/Individual
504	EE.B.3c.Notify Exchange of Other Insurance l Determine if individual is Enroll in ESHI	As the exchange I must determine if the individual is enrolled in Employer Sponsored Health Insurance (ESHI) to determine if the applicant is a child or other family member, whether family coverage is available	NY-HX (CM)/Individual

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505	EE.B.3c.Notify Exchange of Other Insurance l Determine Access or Enroll in ESHI	As the exchange I must determine if the individual has access to or is enrolled in ESHI to determine if the coverage is considered affordable.	NY-HX (CM)/Individual
506	EE.B.3c.Notify Exchange of Other Insurance l Inform NYHX of Cobra Purchase	As a consumer, I want to tell the xxchange if I purchased COBRA in the last 60 days.	NY-HX (CM)/Individual
507	EE.B.3c.Notify Exchange of Other Insurance l Determine Access to COBRA to Determine MEC	As the Exchange I must determine if the individual is enrolled in or has access to COBRA to determine if coverage is considered MEC	NY-HX (CM)/Individual
508	EE.B.3c.Notify Exchange of Other Insurance l Determine if COBRA and Coverage is Affordable	As the exchange I must determine if the individual is enrolled in or has access to COBRA to determine if coverage is considered affordable.	NY-HX (CM)/Individual
509	EE.B.3c.Notify Exchange of Other Insurance l Determine if COBRA and is Eligible for APTC	As the exchange I must determine if the individual is enrolled in or has access to COBRA to determine if the individual is eligible for APTC when purchasing a new policy.	NY-HX (CM)/Individual
510	EE.B.3c.Notify Exchange of Other Insurance l Determine If Individual is Eligible for Medicare and Considered Affordable	As the exchange I must determine if the individual is eligible for Medicare to determine if coverage is considered affordable	NY-HX (CM)/Individual
511	EE.B.3.Notify Exchange of Other Insurance l Determine Medicare Eligible if Custodial Adult and isa Medicaid Eligible Child	As the exchange I must determine if the household contains a Medicare eligible custodial adult and a Medicaid eligible child.	NY-HX (CM)/Individual
512	EE.B.3c.Notify Exchange of Other Insurance l Determine if Individual had Medicare and is Medicaid Eligible	As the exchange I must determine if the individual is enrolled in Medicare to determine may also be eligible for Medicaid coverage to enroll them as a dual eligible	NY-HX (CM)/Individual
513	EE.B.2a & 2b.Eligbility Determination l Identify Citizen/Immigration Status	As a Consumer, I need to identify my citizenship/immigration status (each member of the household) so I may determine eligibility.	NY-HX (CM)/Individual
514	EE.B.8.Exceptions l Review Descrepant Citizenship Status	As a consumer I want to review the citizenship verification status if it is discrepant so I can move forward in the process	NY-HX (CM)/Individual
515	EE.B.9.Summary Page | Review Immigration Verification Status	As a consumer I want to review the immigration verification status so I can move forward in the process	NY-HX (CM)/Individual

RTC ID	Summary	Description	Filed Against
516	EE.B.8.Correct or Edit Application | Update mmigration Info	As a consumer I want the ability to update my immigration information so I can move forward in the process.	NY-HX (CM)/Individual
517	EE.B3.Apply-Determine Eligibility l Provide Race and Ethnicity	As a consumer, I may like to provide my race and ethnicity for each member of the household so the exchange can identify demographical information for statistical purposes.	NY-HX (CM)/Individual
518	EE.B.3.Determine Eligibility | Provide Address of HH Members Who Do Not Reside	As a Consumer, I need to provide the address for those members of the tax household that do not reside with me so I can proceed with the application process.	NY-HX (CM)/Individual
519	EE.B3.Determine Eligibility l Indicate No Permanent Residence Address	As a consumer, I need to identify that I have no permanent residence address (homeless) so I may proceed with the application process.	NY-HX (CM)/Individual
520	EE.B.3.Apply-Determine Eligibility l Identify If Taxes Were Filed For Prior Year	As a consumer, I need to identify if I filed taxes for the prior year so I can see my income as reported by the IRS.	NY-HX (CM)/Individual
521	EE.B.3.Apply-Determine Eligibility l Identify Primary Tax Filer	As a consumer, I need to identify the primary tax filer in the household so the exchange will know how to access the hub.	NY-HX (CM)/Individual
522	EE.B.8.NYHX provide abilty to correct hub information | Confirm reasonably compatible income	As a Consumer, I want to confirm the income being displayed is reasonably compatible so I can move on to the next section of the process	NY-HX (CM)/Individual
523	EE.B.8.DisputeNegative HUB Response l Provide Explanation of Discrepant Projected Annual Income	As a consumer, I need to indicate that the income being displayed is not reasonably compatible of my projected annual income so I can provide an explanation of why its discrepant.	NY-HX (CM)/Individual
524	EE.B.8.Exceptions | Explain IRS Income Discrepancy	As a consumer, I need to provide an explanation as to why my displayed IRS income does not match my attested income.	NY-HX (CM)/Individual
525	EE.B.3.Apply-Determine Eligibility l Report Projected Income Differs From IRS	As a consumer, I need to indicate whether I have a job in the current year so I can report my projected income of the income displayed from the IRS was not representative.	NY-HX (CM)/Individual
526	EE.B.3.Apply-Determine Eligibility l Report HH Member Income	As a consumer, I need to report the amount and frequency of the job related income of everyone in the household so that household income can be calculated.	NY-HX (CM)/Individual
527	EE.B.3.Apply-Determine Eligibility l Indicate HH Member Self Employment	As a consumer, I need to indicate whether any member of my household will have self employment income so that my household income can be calculated.	NY-HX (CM)/Individual

RTC ID	Summary	Description	Filed Against
528	EE.B.3.Apply-Determine Eligbility l Report Self Employment Income	As a consumer, I need to report the amount of self employment income so that my household income can be calculated.	NY-HX (CM)/Individual
529	EE.B.3.Apply-Determine Eligibility l Report HH Member Other Income	As a Consumer, I need to indicate that anyone in my Household will have any other income such as…… (dividends, stock income, unemployment) and if so what is the amount of other income so my Household income can be calculated	NY-HX (CM)/Individual
530	EE.B.3.Apply-Determine Eligibility l Report HH Member Adjusted Income	As a consumer, I need to indicate whether any member of my household will have adjustment income and if so, the amount of the adjustments so that my Household income can be calculated.	NY-HX (CM)/Individual
531	EE.B.8.Correct information in application | Update HH income details	As a Consumer, I would like to update/edit my Household income details so my Household income can be calculated correctly	NY-HX (CM)/Individual
532	EE.B.13.Alaskan Native /Native American | Identify Self as an Alaskan Native /Native American	As a consumer, I would like to identify that I am member of a federally recognized America Indian or Alaskan Native in order to move forward with the application process.	NY-HX (CM)/Individual
533	EE.B.3.Apply-Determine Eligibility l Report HH Member Needs Daily Assistance	As a consumer, I would like to identify that a member of my household may need assistance with daily life activities so their eligibility may be determined for the appropriate category of Medicaid that will provide the services they need.	NY-HX (CM)/Individual
534	EE.B.3.Determine Eligibility l Determine Qualifying Status for Long Term Care	As a consumer, I would like to understand if I or member of my household qualify for long term care so eligibility can be appropriately determined	NY-HX (CM)/Individual
535	EE.B.3.Determine Eligibility l Idenfity Disability	As a consumer, I would like to identify that a member of my household is disabled, chronically ill or blind and has been determined to be disabled by Medicaid, SSA, or Railroad Retirement as "Totally and Permanently Disabled" or is certified blind by the Commission for the Blind and Visually Handicapped, so their eligibility may be determined for the appropriate category (non-MAGI).	NY-HX (CM)/Individual

RTC ID	Summary	Description	Filed Against
536	EE.B.9.Summary Page | Summary Screen Broken Down in Sections	As a consumer, I want to be presented with a summary screen that is broken down into the various sections of the application on the exchange before I hit submit to verify that all of the information that I have entered is accurate so that I am giving correct information to the Exchange for eligibility determination.	NY-HX (CM)/Individual
537	EE.B.8.Eligibility Exceptions| Ability to Update or Edit Information Entered by the User	As a consumer, I want to have the ability to edit any of the sections in the event that I entered information incorrectly or if I need to update my information on the application so that my correct information is sent to the Exchange for eligibility determination.	NY-HX (CM)/Individual
538	EE.B.3.Eligibility Exceptions | Resubmission to Electronic Resources Based on Changes and Updates	As the exchange, I want to the ability to “talk to the hub again” if a consumer makes any changes to any of the information that was previously sent to the hub so that the eligibility is determined accurately.	NY-HX (CM)/Individual
539	EE.B.3.Apply-Determine Eligbility l Capture Permission to Use IRS Data	As the exchange, I want the ability to capture permission from the consumer to use their information from IRS for the following year so that the consumer’s eligibility can be renewed automatically.	NY-HX (CM)/Individual
540	EE.B.3.Determine Eligibility l Final Review for Eligibility Submission	As a consumer, I want to the ability to submit my application after I have reviewed my information so that my application is sent and I can get my eligibility determination.	NY-HX (CM)/Individual
541	Non financial aid consumer consent to check information	As a consumer, who is not seeking financial assistance, I would like to give my consent to check my information against the applicable databases so that I may buy insurance through the exchange.	NY-HX (CM)/Individual
542	EE.B.3.Apply- Determine Eligbility l Check Incarceration Status	As the exchange I want to send applicant information to various data services to determine if applicant is incarcerated in order to have my eligibility determined.	NY-HX (CM)/Individual
543	EE.B.6.Determine Eligibility | Verify Lawfully Present	As an exchange I want to check against the federal hub to ensure that everyone who is receiving insurance through the exchange is lawfully present.	NY-HX (CM)/Individual

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544	EE.B.3b.Enroll HH members in NYHX when residency standard is met | Verify one HH member resides in service area	As an exchange I want to ensure that at least one taxpayer in the tax household resides within the service area of the exchange if information is received that is not reasonably compatible with the attestation of residency	NY-HX (CM)/Individual
545	EE.B.8.Mulitple clocks for account action | Ninety day clock immigration status	As a consumer I will have 90 days from the time the communication is sent from the Exchange to provide documentation for citizenship or immigration status, and/or Indian status, and/or incarceration status, and/or employer sponsored or public MEC I have, so that I can continue with the application process.	NY-HX (CM)/Individual
546	EE.B8.Eligibility Exceptions l Provide Citizenship & Immigration Documents	As a consumer I will have to provide citizenship or immigration documentation if it cannot be electronically verified so that I can have my eligibility determined.	NY-HX (CM)/Individual
547	EE.B.8.Mulitple clocks for account action | Ninety day clock income status	As a consumer I will have 90 days from the time the communication is sent to send the exchange income and/or residency documentation to have adequate time to gather necessary documentation.	NY-HX (CM)/Individual
548	EE.B.8.Exceptions | Documentation to Prove Income	As a consumer I will have to provide income documentation to prove my income if IRS or NYS Hub information is not reasonably compatible with my current income.	NY-HX (CM)/Individual
549	EE.B.8.NYHX provide abilty to correct hub information | Provide income discrepancy explanation	As a consumer I will have to provide an explanation as to why my current income is different from the data source so that my eligibility can be determined.	NY-HX (CM)/Individual
550	EE.B.3. Apply-Determine Eligbility l Provide Immigration Category	As a consumer I need to provide my immigration category so the exchange can determine the correct Federal and State shares for funding.	NY-HX (CM)/Individual
551	EE.B.3.NYHX ping for data | Ping state hub if no fed hub	As the Exchange, if there is no income data in the federal hub, I must go to the State Hub for income data so that the consumer's income can be verified.	NY-HX (CM)/Individual
552	EE.B.3.Apply-Determine Eligibility l No Income Data via HUB	As a consumer if there is no income data in the State hub for me, I will have to provide income documentation so that financial eligibility can be determined.	NY-HX (CM)/Individual
553	EE.B.8.NYHX provide abilty to correct hub information | Attest to financial eligibility	As a consumer , if I do not have income documentation, I may provide an attestation so that financial eligibility can be determined.	NY-HX (CM)/Individual

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554	EE.B.1.Create user logon and password | Log back into account	As a consumer, I want to log back into and out of my account to so I can access my existing account.	NY-HX (CM)/Individual
555	EE.G.1.Change/Delete/Update Info l Report a Change In Situation	As a consumer, I want to report a change to my situation (income, household comp, residence address etc..) so the exchange accurately reflects my change in situations.	NY-HX (CM)/Individual
556	EE.B.8.Correct information in application | Verify new information with hub	As a consumer, I want to have the information that I changed re-verified (if applicable) using electronic data sources so that my eligibility can be re-determined.	NY-HX (CM)/Individual
557	EE.B.3.Apply-Determine Eligibility l Re-determine Eligibility	As a consumer, I want my eligibility to be re-determined based on the changed information so that my eligibility can be re-determined.	NY-HX (CM)/Individual
558	OVR.B.Auto Save User Entered Data | Save All Data Entered by the User Real Time	As a consumer, I want my information to be auto-saved when I am logged into my account so that I don't lose any information that I have entered.	NY-HX (CM)/Individual
559	EE.D.8.Documentation Status | Upload DocumentsTo Validate Changes	As a consumer, I want to upload documents to validate the changes that I reported if electronic sources are not available so that my eligibility is determined appropriately.	NY-HX (CM)/Individual
560	EE.B.10.Designate an authorized rep | NYHX obtain power of attorney docs	As the Exchange I need to obtain documentation of designated Power of Attorney so the agent may access the Exchange on behalf of the designating individual.	NY-HX (CM)/Individual
561	EE.C.0-3.Plan Selection l Guided Process Through Plan Selection	As a consumer I want to be given a choice of being guided through the process of selecting a plan	NY-HX (CM)/Individual
562	EE.C.1-3.Plan Selection Criteria| View plans	As a consumer I want to be able to see plans based on my selected criteria	NY-HX (CM)/Individual
563	EE.C.1-3.Plan Selection| Change Filtering Options	As a consumer I want to be able change my filtering options at any time in order to refine my plan selections	NY-HX (CM)/Individual
564	EE.C.0-3.Plan Selection| See All Plans Available	As a consumer I want to see all plans available to me so I can choose my own filtering options.	NY-HX (CM)/Individual
565	EE.B.3.Apply-Derive APTC and CSR l Present Tax Credit to Understand OOP Cost	As a consumer , I would like to be presented with my tax credit based on a monthly calculation so I can better understand my out of pocket cost.	NY-HX (CM)/Individual
566	EE.C.0-3.Plan Selection l Sort Plans Per My Filtering Criteria	As a consumer, I would like view plans sorted in the sequence I asked for.	NY-HX (CM)/Individual
568	EE.C.0-3.Plan Selection | Reset Filter Criteria	As a consumer, I would like to be able to reset my specific filter criteria(without effecting other criteria I have selected)	NY-HX (CM)/Individual

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569	EE.C.0-3.Plan Selection | Provide Summary of Benefits For Each Plan	As a consumer, I would like an option to see a summary of benefits for each plan selected.	NY-HX (CM)/Individual
570	EE.D.0-3.Plan Selection | Plan Comparison	As a consumer, I would like to be able to do a side by side comparison so I can select my plan.	NY-HX (CM)/Individual
571	EE.F.1a.NYHX User Account Management | Save Plan Selections	As a consumer I would like to save for later sessions selected plans based on my basic screening criteria to a favorites list in order to facilitate plan comparisons after changing filtering criteria so I can effectively choose a plan	NY-HX (CM)/Individual
572	EE.D.0-1.Plan Selection | Clear Selected Favorites To Faciltate Plan Selection	As a Consumer, I would like to be to clear one or all of my selected favorites in order to facilitate plan selection and comparison	NY-HX (CM)/Individual
573	EE.D.0-3.Plan Selection | Provide Summary of Benefits, Estimated OOP, APTC, Metal Level and, Quaility and Customer Ratings	As a consumer, I would like to be provided with the deduct, copay, prem, co-ins, estimated oop, APTC, quality rating, customer rating, "metal level" and a link to the plan home page so I can make an informed decision choosing my plan.	NY-HX (CM)/Individual
574	EE.D.0-3. Plan Selection l Search for Participating Phys, Hosp within Plans	As a consumer, I would like to search for participating phys, hosp, within an individual plans so…..	NY-HX (CM)/Individual
575	EE.D.0-3.Plan Selection l Ability to See Covered Drugs by Plan	As a consumer, I would like the ability to see what drugs are covered by each plan.	NY-HX (CM)/Individual
577	EE.D.0-3.Plan Selection | Available Plans By Household Member	As a consumer, I would like to see the available plans by household member and for my entire household so I can…..	NY-HX (CM)/Individual
578	EE.D.0-3.Plan Selection | Sort Providers By Distance	As a consumer, I would like to see the name and type of phys sorted by distance from a defined address or zip code I specify (i.e. work and home).	NY-HX (CM)/Individual
579	EE.D.8.Documentation Status | Add Sequence Numbers to Docs	As a consumer, I want the ability to unique identify by documents with a sequence number	NY-HX (CM)/Individual
580	EE.B.3.Eligibility Determination l Apply For Health Ins	As a consumer, I want to apply for health coverage for myself and/or household members so I may proceed with the application process.	NY-HX (CM)/Individual
581	EE.B.9.Present summary of information | Vary APTC	As a consumer, I would like to change my APTC amounts at any time during the yr so I can change my reconciliation at tax time.	NY-HX (CM)/Individual

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583	EE.D.9.Enrollment Status l Confirmation of Application Submission	As a consumer, I would like confirmation of my application submission so I can ensure my application has been sent for review.	NY-HX (CM)/Individual
584	EE.B.3.Determine Eligibility l Provide Response to Eligibility Determination	As a consumer, I would like a response to my eligibility determination so I can begin plan selection.	NY-HX (CM)/Individual
585	EE.B.3c.Identify Other Insurance l Other Coverage Out of State	As a consumer I want the ability to indicate that I have access to or have coverage in another state.	NY-HX (CM)/Individual
586	EE.B.3b.Identify Other Insurance l Coverage Through Non Custodial Parent	As a custodial parent I want to indicate that my children and or I have access to coverage through the non custodial parent.	NY-HX (CM)/Individual
587	EE.B.3b.Identify Other Insurance l Coverage Through Custodial Parents	As a non custodial parent I want to indicate that my children and or I have access to coverage through the custodial parent.	NY-HX (CM)/Individual
588	EE.B.3c.Identify Other Insurance l Inform COBRA Premium	As a consumer I need to tell the exchange what my potential COBRA premium is.	NY-HX (CM)/Individual
589	EE.B.3c.Other Insurance l Potential COBRA is MEC	As a consumer I need to tell the exchange if my potential COBRA is MEC	NY-HX (CM)/Individual
590	OVR.A.3.Persistent Features (Static Pages) | Searchable Doc of Navigators and Assistors	As a consumer, I want to be able to locate an assistor/navigator close to me by accessing a searchable document so that I can get help in person.	NY-HX (CM)/Individual
594	OV.A.1.User Portal via Multiple Browers l Develop NYHX on multiple browsers	As an developer, I would need be able to develop the NYHX via multiple browsers (Safari, Google Chrome etc…) so can effectively navigate the NYHX.	NY-HX (CM)/Individual
595	OVR.A.3.Persistent Features (Static Pages) | Interface with Maximus	As a developer I need to develop an interface with maximus software	NY-HX (CM)/Individual
596	OVR.A.3.Persistant Features (Static Pages) | Interface With Geo-Location Software	As a developer I need to be able to interface with external geo-location software so I can find a physician in my zip code.	NY-HX (CM)/Individual
602	EE.A.6.NYHX provide persistant features | Create persistent features	As the web designer, I would like to create persistent features across all user sites so I can effectively navigate.	NY-HX (CM)/Individual

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605	EE.D.7.Enroll Self and HH Members | Purchase Confirmation	As the exchange I want to send the consumer a purchase confirmation so that the user can verify their purchase.	NY-HX (CM)/Individual
606	EE.D.7.Enrollment l Send Enrollment Transaction	As consumer I have completed my review of plan selection and confirmed my plan selection details and I would like the exchange to begin sending my transactions to issuers in order to enroll.	NY-HX (CM)/Individual
612	EE.B.10.Designate an Authorized Rep | Create Authorized Representative	As a consumer I would like to enter information to create an Authorized Representative	NY-HX (CM)/Individual
613	EE.B.10.Designate an Authorized Rep | Give Authorized Rep Signing Authority	As a consumer I would like to indicate the Authorized Representative being associated with the application has authority to sign applications.	NY-HX (CM)/Individual
614	EE.B.14.Print completed application | Print application	As a consumer I would like print the application to obtain a copy for my records.	NY-HX (CM)/Individual
615	EE.E.1.Appeal Eligibility Determination | Appeal Determination	As a consumer I want to appeal the results of specific eligibility results.	NY-HX (CM)/Individual
616	EE.B.3.Apply-Determine Eligibility l HH Member Tax Filing, Dependent Status and Tax Filing Relationship	As a consumer I would like to indicate that the HH member listed either does or does not files taxes, whether or not they can be claimed as a dependent by anyone else, who you are filing with and tax relationship.	NY-HX (CM)/Individual
620	EE.B.3.Determine Eligibility l Identify Full time Student Status	As a consumer, I want to indicate that household members either are or are not full-time students so my eligibility can be accurately determined.	NY-HX (CM)/Individual
622	EE.B.3.Apply-Determine Eligibility l Medical Bill Indication	As a consumer I would like to indicate that the applicant has paid or unpaid medical bills from the past three months.	NY-HX (CM)/Individual
623	EE.B.13.Native American/Alaskan Native | Applicant Can Receive (I/T/U) Services	As a consumer I would like to indicate that the applicant can receive Indian Health Service/ Tribal/Urban Indian Health (I/T/U) services.	NY-HX (CM)/Individual
624	EE.E.3.Appeal Eligibility Determination | Review Appeal	As a consumer I want the ability to review the results of my appeal	NY-HX (CM)/Individual
625	EE.F.1.Apply For Exemption | Individual Exemption	As a consumer I want the ability to prepare and update individual exemption application.	NY-HX (CM)/Individual

RTC User Story Descriptions

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626	EE.F.1.Apply For Exemption | Verify Exemption Application	As a consumer I want the ability to verify exemption application information.	NY-HX (CM)/Individual
627	EE.F.1.Apply For Exemption l Determine Eligibility Exemption	As a consumer I want the ability to determine exemption eligibility	NY-HX (CM)/Individual
628	EE.F.1.Apply for Exemption l Report Status of Exemption	As the health exchange I want the ability to report status of exemption	NY-HX (CM)/Individual
632	EE.B.3.Apply-Determine Eligibility l Understand Incarceration Status for MA BHP	As a consumer I want to understand how my incarceration status effects the status of my eligibly in order to move forward in the process for MA/BHP.	NY-HX (CM)/Individual
633	EE.B.3. Apply-Determine Eligibiliyt l Understand Incarceration Status for APTC	As a consumer I want to understand how my incarceration status effects the status of my eligibly in order to move forward in the process APTC	NY-HX (CM)/Individual
634	EE.B.3.Apply-Determine Eligibility l Understand Incarceration Status for CHIP	As a consumer I want to understand how my incarceration status effects the status of my eligibly in order to move forward in the process for CHIP.	NY-HX (CM)/Individual
635	EE.B.3.Apply-Determine Eligibility l Understand Incarceration Status for Unsubsidized	As a consumer I want to understand how my incarceration status effects the status of my eligibly in order to move forward in the process for unsubsidized	NY-HX (CM)/Individual
636	EE.B.8.Disbute Negative Hub Response l Appeal Incarceration Status	As a user I want to be able to appeal my incarceration status in order to move forward in the process	NY-HX (CM)/Individual
637	EE.B.8.Exceptions | Opportunity to Resolve Discrepancy	As the exchange I want to send a communication to the applicant and provide an opportunity to resolve data discrepancy in order to move forward in the process.	NY-HX (CM)/Individual
638	EE.E.1.Appeal Eligibility Determination | Appeal Decision Up to 90 Days	As the exchange, I want to give the applicant the ability to appeal the decision after up to 90 days in order to move forward in the process.	NY-HX (CM)/Individual
639	EE.B.8.Eligibility Exceptions ("clocks") l Start Clock for Not Incarcerated	As the exchange, I want to start the clock for a consumer to attest that the applicant is not incarcerated in order to move forward in the process.	NY-HX (CM)/Individual
640	EE.B.15.Ping and Store Multiple Sources of Data | Recheck Incarceration Status	As the exchange, I want to recheck the incarceration of the consumer after ninety days in order to determine the eligibility of the applicant.	NY-HX (CM)/Individual

RTC ID	Summary	Description	Filed Against
641	EE.G.2.Disenroll | Disenroll Consumer After Appeal Process Lapses	As the exchange, I want to disenroll the consumer after the appeal process lapses.	NY-HX (CM)/Individual
642	EE.G.2.Disenroll | Notify of Disenrollment	As the exchange I want to send a notice to the consumer that they have been disenrolled.	NY-HX (CM)/Individual
643	EE.B.8.Exceptions | Accept Attestation of Discrepancy	As the exchange I want to accept the proof of attestation to a discrepancy.	NY-HX (CM)/Individual
646	EE.B3.Determine Eligibility l No SSN & Not Required to Have One	As consumer I want to indicate I have no SSN and I am not going to get one because I am not required to have an SSN.	NY-HX (CM)/Individual
647	EE.B3.Determine Eligibilty l Provide SSN for Anyone in the Household	As a consumer I want to provide the SSN for anyone applying for insurance through the exchange	NY-HX (CM)/Individual
648	EE.B.15.Ping and Store Multiple Sources of Data | Submit HH member SSN to HUB	As the exchange I want to submit the SSN for anyone applying to the HUB so I can determine if it is valid SSN.	NY-HX (CM)/Individual
649	EE.B.8.Exceptions | Show Negative Results	As the excahnge, I want to display the negative results to the consumer for editing or attestation.	NY-HX (CM)/Individual
650	EE.B.8.Eligbility Exceptions l Attest to SSN Validity	As a consumer I want the ability to attest that the SSN provided is valid and I want to provide proof so I can prove my eligibility.	NY-HX (CM)/Individual
651	EE.B.2.Detemine Eligibility l Identify Immigration Status	As a consumer, I need to identify my immigration status (each member of the household) so I may determine eligibility.	NY-HX (CM)/Individual
652	EE.B.8.Eligibility Exceptions ("clock") | 90 Day Time Limit for Documentation	As a consumer I will have 90 days from the time the communication is sent from the exchange to provide documentation for immigration status, and/or Indian status, and/or incarceration status, and/or employer sponsored or public MEC I have, so that I can continue with the application process.	NY-HX (CM)/Individual
653	EE.B8.Eligibility Exception l Provide Citenzenship or Immigration Documentation	As a consumer I will have to provide citizenship or immigration documentation if it cannot be electronically verified so that I can have my eligibility determined.	NY-HX (CM)/Individual
734	EE.B.3.Determine Eligibility l Provide Household Data	As a consumer, I would like to provide my and/or my household names, DOBs and gender and identification of the primary applicant so that I may proceed with the application process.	NY-HX (CM)/Individual

RTC ID	Summary	Description	Filed Against
804	EE.B.8.Exceptions| Applied for SSN and Not Yet Received	As a consumer, I want to indicate that I have applied for an SSN and have not yet received it but I would like to move forward with the application process.	NY-HX (CM)/Individual
808	PM.G.3.Initial Load QHP | Business Rules for Mapping Between SERFF and Exchange	As the Business Analyst, I want to finish defining and reconcile again if necessary the values for each of the coded attributes and map them between SERFF and the Exchange. (User Story) Question: Is this replaced by the Physical Data Modeling user story or a subsequent sub-set of it? Implements G3 on The Blue Sheet	NY-HX (CM)/Plan Management
936	PM.B.1.Annual Load MMC | Receive Medicaid Managed Care Plan Data	As an Exchange Administrator, I want to ensure that the NY-HX Receives Medicaid Managed Care (MMC) Plan Data	NY-HX (CM)/Plan Management
937	PM.C.4.Store Provider Network | Store Provider Network data	As an Exchange Administrator, I want to ensure that provider network data from PNDS is Stored.	NY-HX (CM)/Plan Management
938	PM.B.3.Annual Load BHP | Receive BHP Data	As the Exchange Administrator, I want to receive BHP Data so that plan information can be made available on the Exchange.	NY-HX (CM)/Plan Management
939	PM.B.4.Annual Load Multi | Load Multi State Plan Data	As the Exchange Administrator, I want to ensure that Multi-State Plan Data is Loaded.	NY-HX (CM)/Plan Management
940	PM.C.1.Pull Provider Network | Define the workflow to receive and store PNDS Data	As an Exchange Administrator, I want to ensure that the workflow to receive and store PNDS Data is Defined.	NY-HX (CM)/Plan Management
941	PM.C.2.Pull GEO Axis | Pull GEO Axis Data from the PNDS	As the Exchange Administrator, I want to ensure that GEO-Axis Data from the Provider Network Data System (PNDS) is pulled.	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
942	PM.C.3.Process Provider Net Changes | Store Provider Network Data from the Provider Network Data System (PNDS)	As the Exchange Administrator, I want the PNDS data to be stored so that the plan information can be properly displayed in the Plan Management area of the Exchange.	NY-HX (CM)/Plan Management
943	PM.D.1.Receive Quality Data | Process Changes to Provider Network Data	As an Exchange Administrator, I want to ensure that Provider Network Data Changes are Processed. 1. Poll the staging tables for the provider network data whose associated plans are approved by exchange regulators 2. Insert/ Update the above data into the operational tables 3. Update the status for corresponding provider data in the staging tables to copied	NY-HX (CM)/Plan Management
944	PM.D.1.Receive Quality Data | Receive Quality Data from the QARR System	As the Exchange Administrator, I want to ensure thatQuality Data from the Quality Assurance Reporting Requirements (QARR) System is Received.	NY-HX (CM)/Plan Management
945	PM.D.2.Store Quality Data | Store Quality Data from the QARR System	As an Exchange Administrator, I want to ensure that Quality Data from the QARR System is Stored. 1. Generate JPA entities using Maven 2. Define the repositories for the generated entities 3. Define CRUD methods in the repositories 4. Perform unit tests of the above created entities 5. Integrate it in Spring	NY-HX (CM)/Plan Management
946	PM.E.1.Recertification | Define BPEL for Recertification	As the Exchange Administrator, I want to ensure that Recertification Actions are processed. 1. Identify the workflow items to be made part of the BPEL workflow process 2. Define a web service proxy to receive the recertified plan data 3. Integrate the work items with validation and persistant web services	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
947	PM.E.2.Decertification | Define BPEL for Decertification	As the Exchange Administrator, I want ensure that DeCertification Actions are Processed and the BPEL is Defined. 1. Identify the workflow items to be made part of the BPEL workflow process 2. Define a web service proxy to receive the decertified plan data 3. Integrate the work items with validation and persistant web services	NY-HX (CM)/Plan Management
948	PM.E.3.Decertification Appeal | Process Appeal of DeCertification Actions	As an Exchange Administrator, I want to ensure that Appeals of DeCertification Actions are Processed. Research required on whether this is outside the scope of Exchange	NY-HX (CM)/Plan Management
949	PM.E.4.Suspend Enrollment | Suspend New Enrollment- Define BPEL	As an Exchange Administrator, I want to ensure that New Enrollment is Suspended. 1. Identify the workflow items to be made part of the BPEL workflow process 2. Define a web service proxy to receive the suspended plan data 3. Integrate the work items with validation and persistant web services	NY-HX (CM)/Plan Management
950	PM.E.5.Lift Suspension | Lift Suspension on New Enrollment- Define BPEL	As an Exchange Administrator, I want to ensure that the Suspension on New Enrollment is Lifted and the BPEL is Lifted. 1. Identify the workflow items to be made part of the BPEL workflow process 2. Define a web service proxy to receive the plan revocation data 3. Integrate the work items with validation and persistant web services	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
951	PM.E.6.Rate Change | Process Rate Change- QHP	As an Exchange Administrator, I want to ensure that Rate Changes for QHP are Processed. 1. Receive the rate change data from SERFF 2. Invoke the validation web services to perform business and data validatons 3. In case of failures, consolidate the error messages and send a notification email to exchange regulator with the list of error messages 4. In case of success, invoke the persistance web services and store the data in the database using JPA entities 5. Write a batch process to move the rate change data from staging to operational on the effective date of the rate change	NY-HX (CM)/Plan Management
953	PM.E.7.Benefit Change | Process Benefit Change for QHP	As the Exchange Administrator, I want ensure that Benefit Changes for QHPs are processed.	NY-HX (CM)/Plan Management
955	PM.E.8.Monitor Provider Network Changes | Monitor and Assess Provider Network Changes	As an Exchange Administrator, I want to ensure that Provider Network Changes are Monitored and Assessed. 1. Define a batch job that will poll PNDS system in regular intervals (quarterly/ on need basis) 2. Pull the provider network data 3. Transform the provider network data into NY-HX model 4. Invoke the web service to push the transformed data to services layer 5. Persist the data received from web service using JPA entities	NY-HX (CM)/Plan Management
957	PM.F.1.QHP Formulary | Accept QHP Plan Formulary URL via SERFF	As an Exchange Administrator, I want to ensure that QHP Plan Formulary URL via SERFF is Accepted. Check to see if formulary URL for a QHP plan has been populated correctly.	NY-HX (CM)/Plan Management

RTC User Story Descriptions

RTC ID	Summary	Description	Filed Against
959	PM.F.2.CHIP Formulary | Accept CHIP Plan Formulary URL via CHIP Template	As an Exchange Administrator, I want to ensure that the CHIP Plan Formulary URL via CHIP Template is Accepted. Check to see if formulary URL for a CHIP plan has been populated correctly.	NY-HX (CM)/Plan Management
961	PM.F.3.MMC Formulary | Accept MMC Plan Formulary URL via Medicaid Template	As an Exchange Administrator, I want to ensure that the N-HX Accepts MMC Plan Formulary URL via Medicaid Template. Check to see if formulary URL for a Medicaid plan has been populated correctly.	NY-HX (CM)/Plan Management
963	PM.F.4.BHP Formulary | Accept BHP Plan Formulary URL via Medicaid Template	As the Exchange Administrator, I want ensure that BHP Plan Formulary URL via Medicaid Template is accepted. Check to see if formulary URL for a BHP plan has been populated correctly.	NY-HX (CM)/Plan Management
964	PM.G.2.PM Integration | Integrate Plan Management with Other Exchange Business Areas- EE Individual	As the Exchange Administrator, I want Plan Management Integrated with Other Exchange Business Areas, including EE Individual.	NY-HX (CM)/Plan Management
966	PM.G.4.Initial Load MMC | Initial Load of MMC Plan Data moved from UAT Tables to Production	As an Exchange Administrator, I want to ensure that the Initial Load of Medicaid Managed Care (MMC) Plan Data is moved from UAT Tables to Production. 1. Write scripts to identify the plans and move them to production database	NY-HX (CM)/Plan Management
970	PM.G.7.Initial Load Provider | Load Provider Network Data moved from UAT Tables to Production	As the Exchange Operator, I want Provider Network data moved from the UAT tables to Production so that the data is stored correctly on the Exchange.	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
973	PM.C.1.Pull Provider Network | Create a transformer to transform PNDS Data into NY-HX Model	As an Exchange Administrator, I want to ensure that Provider Network data is pulled. 1. Define an XSD to convert PNDS data into NY-HX model 2. Receive the XML file from the BPEL process in Informatica 3. Write a parser to parse the above XML data 4. Write a transformer to transform the above XML into NY-HX model	NY-HX (CM)/Plan Management
974	PM.C.1.Pull Provider Network | Create a SOAP/JMS web service to store provider network data in the exchange	As the Exchange Administrator, I want a SOAP/JMS web service created so that I can store provider network data in the Plan Management area of the Exchange.	NY-HX (CM)/Plan Management
975	PM.C.3.Process Provider Net Changes | Create JPA entities for PNDS model in NY-HX	As an Exchange Administrator, I want to ensure that Provider Net Changes are processed.	NY-HX (CM)/Plan Management
976	PM.E.1.Recertification | Validate the plan data for recertification	As the Exchange Administrator, I want to ensure that recertification Actions are processed and the plan data is validated. 1. Enhance the validation framework to validate QHP plan data	NY-HX (CM)/Plan Management
1020	PM.E.1.Recertification | Batch Process to update the plans during recertification	As the Exchange Administrator, I want to ensure that Process Recertification Actions- Batch Process to update the plans during recertification 1. Create a batch job that runs daily during the end of day to poll the staging tables of Plan Management 2. Create processing logic for the above batch process to logically update the plan data in the operational tables 3. Create processing logic to update the status of recertified plans in staging tables	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1021	PM.E.2.Decertification | Validate the plan data for Decertification	As the Exchange Administrator, I want ensure that DeCertification Actions plan data validations are Processed. 1. Enhance the validation framework to validate QHP plan data	NY-HX (CM)/Plan Management
1022	PM.E.2.Decertification | Batch process to update the plans during decertification	As the Exchange Administrator, I want to ensure that DeCertification Actions are Processed.	NY-HX (CM)/Plan Management
1023	PM.B.2.Annual Load CHIP | Load CHIP Data	As the Exchange Administrator, I want to receive CHIP data so that plan information can be made available on the Exchange.	NY-HX (CM)/Plan Management
1024	PM.B.5.Annual Load Quality | Load Qualtiy data into exchange	As the Exchange Administrator, I want ensure that Annual load of quality data into exchange is performed.	NY-HX (CM)/Plan Management
1027	PM.B.4.Annual Load Multi | Multi State Plan Process Diagram	As the Exchange Administrator, I want to ensure that a Multi-State Plan Process Diagram is created. 1. Diagram the way that NY-HX will receive Multi-State Plan data from ?? 2. Receive SME input 3. Review with data source SMEs and DOH 4. Adjust process 5. Confirm/Finalize	NY-HX (CM)/Plan Management
1028	PM.D.1.Receive Quality Data | QARR Process Diagram	As the development team, I want to work with the Technical Writer to create a QARR Process Diagram. 1. Diagram the way that NY-HX will receive QARR data from ?? 2. Receive SME input 3. Review with data source SMEs and DOH 4. Adjust process 5. Confirm/Finalize	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1029	PM.E.4.Suspend Enrollment | Suspend New Enrollment- Batch process to update the plans during suspension	As an Exchange Administrator, I want to ensure that New Enrollment is Suspended. 1. Create a batch job that runs daily during the end of day to poll the staging tables of Plan Management 2. Create processing logic for the above batch process to logically update the plan's status and plan data in the operational tables 3. Create processing logic to update the status of suspended plans in staging tables	NY-HX (CM)/Plan Management
1030	PM.E.5.Lift Suspension | Lift Suspension on New Enrollment- Batch process to update the plans	As an Exchange Administrator, I want to ensure that Suspension on New Enrollment is Lifted. 1. Create a batch job that runs daily during the end of day to poll the staging tables of Plan Management 2. Create processing logic for the above batch process to logically update the plan's status to active and plan data in the operational tables 3. Create processing logic to update the status of revoked plans in staging tables	NY-HX (CM)/Plan Management
1037	PM.E.6.Rate Change | Process Rate Change- Multi-state Plan	As an Exchange Administrator, I want to ensure that theRate Change-Multi-state Plan is processed. 1. Receive the rate change data from SERFF 2. Invoke the validation web services to perform business and data validatons 3. In case of failures, consolidate the error messages and send a notification email to exchange regulator with the list of error messages 4. In case of success, invoke the persistance web services and store the data in the database using JPA entities 5. Write a batch process to move the rate change data from staging to operational on the effective date of the rate change	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1039	PM.E.6.Rate Change | Process Rate Change- CHIP	As an Exchange Administrator, I want to ensure that Rate Changes for CHIP are Processed. 1. Receive the rate change data 2. Invoke the validation web services to perform business and data validatons 3. In case of failures, consolidate the error messages and send a notification email to exchange regulator with the list of error messages 4. In case of success, invoke the persistance web services and store the data in the database using JPA entities 5. Write a batch process to move the rate change data from staging to operational on the effective date of the rate change	NY-HX (CM)/Plan Management
1040	PM.E.6.Rate Change | Process Rate Change- BHPs	As an Exchange Administrator, I want to ensure that the BHPs Rate Change are Processed. 1. Receive the rate change data 2. Invoke the validation web services to perform business and data validatons 3. In case of failures, consolidate the error messages and send a notification email to exchange regulator with the list of error messages 4. In case of success, invoke the persistance web services and store the data in the database using JPA entities 5. Write a batch process to move the rate change data from staging to operational on the effective date of the rate change	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1041	PM.E.7.Benefit Change | Process Benefit Change- Multi-state Plans	As an Exchange Administrator, I want to ensure that the Benefit Change- Multi-state Plans is processed. 1. Receive the benefit change data from SERFF 2. Invoke the validation web services to perform business and data validatons 3. In case of failures, consolidate the error messages and send a notification email to exchange regulator with the list of error messages 4. In case of success, invoke the persistance web services and store the data in the database using JPA entities 5. Write a batch process to move the benefit change data from staging to operational on the effective date of the benefit change	NY-HX (CM)/Plan Management
1042	PM.G.2.PM Integration | Integrate Plan Management with Other Exchange Business Areas- SHOP	As an Exchange Administrator, I want to ensure thatPlan Management is Integrated with Other Exchange Business Areas- SHOP 1. Identify the interfaces and business objects needed by SHOP to get plan related data 2. Define the process flow diagrams that depicts the data flow between PM and SHOP 3. Define the interfaces 4. Define the XSD 5. Define the WSDL 6. Review the XSD and WSDL with SHOP 7. Define the SOAP/JMS web services that could be consumed by SHOP 8. Implement the inerfaces to retrieve the plan data that matches the criteria for SHOP	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1043	PM.G.2.PM Integration | Integrate Plan Management with Other Exchange Business Areas- CS	As an Exchange Administrator, I want to ensure that Plan Management is Integrated with Other Exchange Business Areas- (CS) Customer Service. 1. Identify the interfaces and business objects needed by Customer Service (CS) to get plan related data 2. Define the process flow diagrams that depicts the data flow between PM and CS 3. Define the interfaces 4. Define the XSD 5. Define the WSDL 6. Review the XSD and WSDL with CS 7. Define the SOAP/JMS web services that could be consumed by CS 8. Implement the inerfaces to retrieve the plan data that matches the criteria for CS	NY-HX (CM)/Plan Management
1044	PM.G.2.PM Integration | Integrate Plan Management with Other Exchange Business Areas- FM	As an Exchange Administrator, I want to ensure that Plan Management is Integrated with Other Exchange Business Areas specifically, FM. 1. Identify the interfaces and business objects needed by FM to get plan related data 2. Define the process flow diagrams that depicts the data flow between PM and FM 3. Define the interfaces 4. Define the XSD 5. Define the WSDL 6. Review the XSD and WSDL with FM 7. Define the SOAP/JMS web services that could be consumed by FM 8. Implement the inerfaces to retrieve the plan data that matches the criteria for FM	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1047	PM.G.3.Initial Load QHP | Initial Load of QHP Data	As an Exchange Administrator, I want to ensure that the Initial Load of QHP Data is completed. 1. Write scripts to identify the plans and move them to production database	NY-HX (CM)/Plan Management
1048	PM.G.1.Design PM System | Maintain reference data elements for Plan Management	As an Exchange Administrator, I want to ensure that reference data elements for Plan Management are Maintained. 1. Define a User Interface to add, update, and delete the reference data elements in Plan Management 2. Create validations that need to be perfomed on the reference data 3. Define the interfaces 4. Define the services to process the actions invoked in UI 5. Implement the above defined interfaces 6. Define the web service to process these requests	NY-HX (CM)/Plan Management
1049	PM.G.5.Initial Load CHIP | Write scripts to identify plans to be moved to database	As an Exchange Administrator, I want to ensure that scripts are Written to identify plans to be moved to database. 1. Write scripts to identify the plans and move them to production database	NY-HX (CM)/Plan Management
1050	PM.G.6.Initial Load BHP | Write scripts to identify plans to be moved to production database	As an Exchange Administrator, I want to ensure that scripts are written to identify the plans and move them to production database.	NY-HX (CM)/Plan Management
1051	PM.G.7.Initial Load Provider | Initial Load of Provider Network	As an Exchange Administrator, I want to ensure that the Initial Load of Provider Network data is performed. 1. Write scripts to identify the plans and move them to production database	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1052	PM.D.2.Store Quality Data | Load Quality Data	As an Exchange Administrator, I want to ensure that Quality Data is Loaded. 1. Received the flat file via FTP from DOH 2. BPEL process will pick up the file and send it to Informatica 3. Parse and transform the data into an XML 4. Send the XML to a validation web service to perform data & business validations (Business rules defined by state will be captured in iLog rules engine and will be applied on the fly after the data validations are successful). 5. In case of a failure, the validation process will continue its process on the remaining records, consolidate the other error messages if any and send a notification email to Exchange Regulator with the complete list of error messages. 6. In case of no issues, the XML file is sent to a web service to transform it into POJO objects 7. The data retrieved from the POJO is persisted into the data base using Spring and JPA (Java Persistence API)	NY-HX (CM)/Plan Management
1053	PM.D.1.Receive Quality Data | Quality Process Diagram	As the development team, I want to work with the Technical Writer to create a Quality Process Diagram. 1. Diagram the way that NY-HX will receive Quality data from ?? 2. Receive SME input 3. Review with data source SMEs and DOH 4. Adjust process 5. Confirm/Finalize	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1054	PM.G.9.Initial Load Multi State | Initial load of Multi State plan data	As an Exchange Administrator, I want to ensure that scripts are written to identify the plans and move them to production database. 1. Write scripts to identify the plans and move them to production database	NY-HX (CM)/Plan Management
1089	SER.Research.0.Research|Coordination of benefits	As the Exchange I would like to know how to handle coordination of benefits	NY-HX (CM)/SHOP-Broker
1091	SER.Architecture and Development.0.Architecture and Development|Tax credit calculator	As the Exchange I would like to provide a way to calculate SHOP Business Tax Credits and other Calculators	NY-HX (CM)/SHOP-Broker
1093	SER.Research.0.Research|EE gap analysis	Technical Story: As the SHOP team we will review the EE user stories to identify any overlap gap analysis Acceptance Criteria: Technical Story: As the SHOP team we will review the EE user stories to identify any overlap gap analysis	NY-HX (CM)/SHOP-Broker
1098	SER.B.3.Employer Register|Employer contact information	As an employer, I want to enter my contact information and preferences for contact. (tax ID, address) to complete my Employer Profile. Acceptance Criteria: As an employer, I want to enter my contact information and preferences for contact. (tax ID, address) to complete my Employer Profile.	NY-HX (CM)/SHOP-Broker
1099	SER.B.3.Employer Register|Employer account setup	As the Exchange, information collected in the Account Setup will be fed into the Employer Profile page as appropriate. Acceptance Criteria: As the Exchange, information collected in the Account Setup will be fed into the Employer Profile page as appropriate.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1105	SER.B.3.Employer Register|Employer register	As an employer I would like to register my company on the Exchange to begin SHOP experience and determine if I'm a qualified employer who can offer Health Insurance to my employees through the Exchange. (Eligibility Information Only) Acceptance Criteria: As an employer I would like to register my company on the Exchange to begin SHOP experience and determine if I'm a qualified employer who can offer Health Insurance to my employees through the Exchange. (Eligibility Information Only)	NY-HX (CM)/SHOP-Broker
1106	SER.B.2.Employer Register|Verify employer	As the Exchange, I want to ping a database to verify the business is a legitimate business in the State of NY. Acceptance Criteria: As the Exchange, I want to ping a database to verify the business is a legitimate business in the State of NY.	NY-HX (CM)/SHOP-Broker
1108	SER.D.1.Employee Roster|Create roster	As an employer I would like create a roster of employees that are eligible for coverage so my employees can enroll for health insurance. (Spike: what information goes on the roster; What type of roster to use) Acceptance Criteria: As an employer I would like create a roster of employees that are eligible for coverage so my employees can enroll for health insurance. (Spike: what information goes on the roster; What type of roster to use)	NY-HX (CM)/SHOP-Broker
1109	SER.G.7.Monitor and Reconcile EE Enrollment|Edit roster	As an employer, I want to edit my roster online (Add / Update / Delete).	NY-HX (CM)/SHOP-Broker
1110	SER.D.6.Employee Roster|Email notify employee	As an employer I want to have the option for the Exchange to send an email to an employee notifying them of updates to the roster. Acceptance Criteria: As an employer I want to have the option for the Exchange to send an email to an employee notifying them of updates to the roster.	NY-HX (CM)/SHOP-Broker
1111	SER.G.7.Monitor and Reconcile EE Enrollment|Delete roster	As an employer, I want to delete my existing roster and then upload a new one. Acceptance Criteria: As an employer, I want to delete my existing roster and then upload a new one.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1112	SER.D.6.Employee Roster|Exchange notify employees	As an employer, I want the Exchange to notify my employees that I have registered them in the system so that I don't have to deal with extra administration. Acceptance Criteria: As an employer, I want the Exchange to notify my employees that I have registered them in the system so that I don't have to deal with extra administration.	NY-HX (CM)/SHOP-Broker
1113	SER.B.1.Employer Register|Primary/secondary contact	As an employer I want to be able to allocate a primary and secondary contact person for the company Acceptance Criteria: As an employer I want to be able to allocate a primary and secondary contact person for the company	NY-HX (CM)/SHOP-Broker
1114	SER.I.3.Brokers/Agents|Broker of record	As an employer I want to be able to identify that I am working with a broker as well as their contact and/or licensing information. Acceptance Criteria: As an employer I want to be able to identify that I am working with a broker as well as their contact and/or licensing information.	NY-HX (CM)/SHOP-Broker
1115	SER.B.3.Employer Register|Review/edit information	As an employer, I want to review and edit my information before submitting my registration. Acceptance Criteria: As an employer, I want to review and edit my information before submitting my registration.	NY-HX (CM)/SHOP-Broker
1116	SER.B.3.Employer Register|Employer electronic signature	As an employer or a designated contact, I want to provide my electronic signature at the end of the application. Acceptance Criteria: As an employer or a designated contact, I want to provide my electronic signature at the end of the application.	NY-HX (CM)/SHOP-Broker
1117	SER.B.3.Employer Register|Employer print application	As an employer I want the option to print my application information at any time. Acceptance Criteria: As an employer I want the option to print my application information at any time.	NY-HX (CM)/SHOP-Broker
1118	SER.B.3.Employer Register|Unique employee id	As an employer, I want to provide my employees with a unique employer code to link employer to employee. Acceptance Criteria: As an employer, I want to provide my employees with a unique employer code to link employer to employee.	NY-HX (CM)/SHOP-Broker
1120	SER.B.2.Employer Register|Activate enrolled employer	As the Exchange Admin, I want to activate an enrolled employer. Acceptance Criteria: As the Exchange Admin, I want to activate an enrolled employer.	NY-HX (CM)/SHOP-Broker

RTC User Story Descriptions

RTC ID	Summary	Description	Filed Against
1121	SER.E.2.Aggregate Premium|EFT money to insurer	As an employer, I want money received by the Exchange to be treated as money received by the insurer. Acceptance Criteria: As an employer, I want money received by the Exchange to be treated as money received by the insurer.	NY-HX (CM)/SHOP-Broker
1122	SER.D.5.Employee Roster|HX validate employer	As the Exchange Admin, I want to validate the employer is a valid employer for New York State so that they can register their company through the Exchange. Acceptance Criteria: As the Exchange Admin, I want to validate the employer is a valid employer for New York State so that they can register their company through the Exchange.	NY-HX (CM)/SHOP-Broker
1123	SER.D.4.Employee Roster|HX edit employer roster	As the Exchange Admin, I want to edit an employer's roster. Acceptance Criteria: As the Exchange Admin, I want to edit an employer's roster.	NY-HX (CM)/SHOP-Broker
1124	SER.B.2.Employer Register|Min participation requirement	As the Exchange, I want to ensure the employer meets the minimum participation percentage.	NY-HX (CM)/SHOP-Broker
1125	SER.B.3.Employer Register|Employer account setup	As an employer I would like to set up an account with the Exchange so I can complete my online application Acceptance Criteria: As an employer I would like to set up an account with the Exchange so I can complete my online application	NY-HX (CM)/SHOP-Broker
1127	SER.C.5.ER Quoting / Select QHP|Employer view QHPs	As an employer I want to be able to see the qualified health plans available through the Exchange Acceptance Criteria: As an employer I want to be able to see the qualified health plans available through the Exchange	NY-HX (CM)/SHOP-Broker
1128	SER.C.5.ER Quoting / Select QHP|Employer compare QHPs	As an employer, I want to compare the QHPs available in my area.	NY-HX (CM)/SHOP-Broker
1129	SER.C.6.ER Quoting / Select QHP|Employer choose QHP(s)	As an employer I want to choose a health plan or plans for my employees Acceptance Criteria: As an employer I want to choose a health plan or plans for my employees	NY-HX (CM)/SHOP-Broker
1130	SER.A.1.EmployER Anonymous Shopping|Employer anonymous shopping	Epic: As an employer, I want to shop anonymously to see what rates are available and what I can offer my employees. Acceptance Criteria: Epic As an employer I want to shop anonymously to see what rates are available and what I can offer my employees.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1131	SER.A.1.EmployER Anonymous Shopping|Employer anonymous shopping medical only	As an employer, I want to anonymously shop only for medical insurance based on number of employees, type of coverage, zip code, and county so that I can determine the impact on my cost. Acceptance Criteria: As an employer, I want to anonymously shop only for medical insurance based on number of employees, type of coverage, zip code, and county so that I can determine the impact on my cost.	NY-HX (CM)/SHOP-Broker
1132	SER.A.1.EmployER Anonymous Shopping|Employer anonymous shopping based on tier	As an employer I want to shop anonymously based on rate basis so that I can get more accurate estimates of my total cost. Acceptance Criteria: As an employer I want to shop anonymously based on rate basis so that I can get more accurate estimates of my total cost.	NY-HX (CM)/SHOP-Broker
1133	SER.A.1.EmployER Anonymous Shopping|Information on financial incentive	As an employer, I want information about any available financial incentive. Acceptance Criteria: As an employer, I want information about any available financial incentive.	NY-HX (CM)/SHOP-Broker
1134	SER.A.1.EmployER Anonymous Shopping|Tax credit calculator	As an anonymous employer, I want to be able to calculate the tax credit I may be eligible for before purchasing through SHOP. Acceptance Criteria: As an anonymous employer, I want to be able to calculate the tax credit I may be eligible for before purchasing through SHOP.	NY-HX (CM)/SHOP-Broker
1135	SER.A.1.EmployER Anonymous Shopping|Temp save option	As an Exchange user, I would like to temporarily save selected plans based on my basic screening critera in order to facilititate plan comparisons after changing filtering criteria so I can effectively choose a plan. Acceptance Criteria: As an Exchange user, I would like to temporarily save selected plans based on my basic screening critera in order to facilititate plan comparisons after changing filtering criteria so I can effectively choose a plan.	NY-HX (CM)/SHOP-Broker
1136	SER.A.1.EmployER Anonymous Shopping|Notify non qualifying employer	As an employer, I want to be notified if I do not qualify for SHOP benefits based on zip code or number of employees. Acceptance Criteria: As an employer, I want to be notified if I do not qualify for SHOP benefits based on zip code or number of employees.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1137	SER.A.1.EmployER Anonymous Shopping|Continue registration from pre-save	As an employer, I want to move forward with my registration from my stored results without re-entering data. Acceptance Criteria: As an employer, I want to move forward with my registration from my stored results without re-entering data.	NY-HX (CM)/SHOP-Broker
1139	SER.C.1.ER Quoting / Select QHP|Employer premium calculator	As an employer, I want to calculate the most beneficial amount for me and my employees. Acceptance Criteria: As an employer, I want to calculate the most beneficial amount for me and my employees.	NY-HX (CM)/SHOP-Broker
1140	SER.C.1.ER Quoting / Select QHP|FT Employer contribution level	As an employer I want to be able to indicate my contribution level for full time employees Acceptance Criteria: As an employer I want to be able to indicate my contribution level for full time employees	NY-HX (CM)/SHOP-Broker
1141	SER.C.1.ER Quoting / Select QHP|PT Employer contribution level	As an employer I want to be able to indicate my contribution level for part time employees Acceptance Criteria: As an employer I want to be able to indicate my contribution level for part time employees	NY-HX (CM)/SHOP-Broker
1142	SER.C.3.ER Quoting / Select QHP|Section 105 information	As a small employer, I would like to know if there are mechanisms to provide a cash payment to employees if I can't afford to provide coverage through the Exchange (Section 105).	NY-HX (CM)/SHOP-Broker
1143	SER.C.2.ER Quoting / Select QHP|Tax credit options	As an employer, I want to see what options I have for tax credits.	NY-HX (CM)/SHOP-Broker
1144	SEE.A.1.Employee Register|Current news	As an Exchange User, I would like to be presented with current news and information regarding the exchange. (e.g open enrollment is Oct 15) Acceptance Criteria: As an Exchange User, I would like to be presented with current news and information regarding the exchange. (e.g open enrollment is Oct 15)	NY-HX (CM)/SHOP-Broker
1145	SEE.A.1.Employee Register|Employee login	As an employee I want to be able to login to choose benefits through my employer Acceptance Criteria: As an employee I want to be able to login to choose benefits through my employer	NY-HX (CM)/SHOP-Broker
1146	SEE.A.1.Employee Register|Track enrollment	As the Exchange, I want to be able to track the enrollment status of employees.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1147	SEE.A.1.Employee Register|Employee contact information	As an employee, I want to be able to enter my contact information and method of contact so that I can receive information from the Exchange.	NY-HX (CM)/SHOP-Broker
1148	SEE.E.1.Life Events|Enter dependents	As an employee, I want to be able to enter my dependents.	NY-HX (CM)/SHOP-Broker
1149	SEE.A.5.Employee Register|Identify Indian/Eskimo	As employee, I want to identify if I am American Indian or Alaskan Native. Acceptance Criteria: As employee, I want to identify if I am American Indian or Alaskan Native.	NY-HX (CM)/SHOP-Broker
1150	SEE.D.4.EE Plan Enrollment|Verify employee	As the Exchange, I want to be able to verify employee applications are accepted by the insurance companies.	NY-HX (CM)/SHOP-Broker
1151	SEE.B.2.Eligibility/Subsidy Determintation|Employee secondary ins.	As the Exchange, I want to know if the employee has other insurance.	NY-HX (CM)/SHOP-Broker
1152	SEE.A.1.Employee Register|Review/edit information	As an employee, I want to review and edit my information before submitting.	NY-HX (CM)/SHOP-Broker
1153	SEE.A.1.Employee Register|Employee electronic signature	As an employee, I want to provide my electronic signature.	NY-HX (CM)/SHOP-Broker
1158	SEE.A.1.Employee Register|Link employee to employer	As an employee, I want to provide my unique Exhange-assigned Employer ID so the Exchange can validate my employer.	NY-HX (CM)/SHOP-Broker
1159	SEE.A.2.Employee Register|Verify employee on roster	As an employee, I want to provide my personal information so the Exchange can verify I am on the Employer's roster.	NY-HX (CM)/SHOP-Broker
1160	SEE.C.3.EE Quoting/Select QHP|Time limit on QHP select	As the Exchange, I want to limit the amount of time employees have to select their QHPs.	NY-HX (CM)/SHOP-Broker
1162	SEE.B.4.Eligibility/Subsidy Determintation|Employee eligibility	As an employee of a small employer, I would like to see if I am eligible for health insurance through my employer's plan	NY-HX (CM)/SHOP-Broker
1163	SEE.C.3.EE Quoting/Select QHP|Employee select QHP	As an employee, I would like to select health coverage from a qualified health plan offered by my employer Acceptance Criteria: As an employee, I would like to select health coverage from a qualified health plan offered by my employer	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1164	SEE.C.2.EE Quoting/Select QHP|Sort plans	As an employee, I would like to sort multiple plans from the list of plans available to me, so that I can choose the best plan. Acceptance Criteria: As an employee, I would like to sort multiple plans from the list of plans available to me, so that I can choose the best plan.	NY-HX (CM)/SHOP-Broker
1165	SEE.C.2.EE Quoting/Select QHP|Filter plans	As an employee, I would like to filter multiple plans from the list of plans available to me, so that I can choose the best plan. Acceptance Criteria: As an employee, I would like to filter multiple plans from the list of plans available to me, so that I can choose the best plan.	NY-HX (CM)/SHOP-Broker
1166	SEE.C.2.EE Quoting/Select QHP|View plan details	As an employee, I would like to view details of specific plans from the list of plans available to me, so that I can choose the best plan. Acceptance Criteria: As an employee, I would like to view details of specific plans from the list of plans available to me, so that I can choose the best plan.	NY-HX (CM)/SHOP-Broker
1167	SEE.C.2.EE Quoting/Select QHP|Compare plans	As an employee, I would like to compare specific plans from the list of plans available to me, so that I can choose the best plan. Acceptance Criteria: As an employee, I would like to compare specific plans from the list of plans available to me, so that I can choose the best plan.	NY-HX (CM)/SHOP-Broker
1168	SEE.D.1.EE Plan Enrollment|Enroll	As an employee, I would like to enroll in health coverage from a qualified health plan offered by my employer	NY-HX (CM)/SHOP-Broker
1169	SEE.E.1.Life Events|Add dependent	As an employee, I would like to add a new dependent because I just had a baby	NY-HX (CM)/SHOP-Broker
1170	SEE.G.1.Appeals-Employee|Ability to appeal decision	As an employee, I want the ability to appeal a decision through the Exchange.	NY-HX (CM)/SHOP-Broker
1171	SEE.G.1.Appeals-Employee|Appeal rules	As the Exchange I would like to know what is appealable by an employee.	NY-HX (CM)/SHOP-Broker
1172	SEE.F.1.Re-Enrollment|Re-enroll same plan	As an employee, I want the Exchange to re-enroll me into the same plan if I do not indicate otherwise so that I maintain my coverage.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1173	SEE.F.2.Re-Enrollment|Notify employee of employer drop	As an employee, I want the Exchange to notify me if my employer is no longer offering the plan I am currently enrolled in for the upcoming year so that I can select a different plan.	NY-HX (CM)/SHOP-Broker
1174	SER.H.1.Employer Enrollment|Employer continue coverage	As an employer, I would like to continue my current plan offering through the Exchange so that my employees will continue coverage.	NY-HX (CM)/SHOP-Broker
1175	SER.H.2.Employer Enrollment|Open enrollment change plan	As an employer, I would like to change my plan offerings during the open enrollment period so that my employees can enroll in health insurance.	NY-HX (CM)/SHOP-Broker
1176	SER.I.4.Brokers/Agents|Access the NYHX via devices	As an Exchange User, I would like to be able to access the NYHX via devices (smart phones, pad) so I can effectively navigate the NYHX.	NY-HX (CM)/SHOP-Broker
1177	SER.I.1.Brokers/Agents|Broker register	As a broker, I would like to be registered through the Exchange so that I can sell insurance through the Exchange. Acceptance Criteria: As a broker, I would like to be registered through the Exchange so that I can sell insurance through the Exchange.	NY-HX (CM)/SHOP-Broker
1178	SER.G.5.Monitor and Reconcile EE Enrollment|Issurer notify of broker pay	As a small business, I want the Exchange to notify health insurance company(ies) which broker should be compensated for my employees.	NY-HX (CM)/SHOP-Broker
1179	SER.I.6.Brokers/Agents|Notify broker of pay	As a broker, I want the Exchange to notify me of payments I should receive from health insurance.	NY-HX (CM)/SHOP-Broker
1181	SER.I.1.Brokers/Agents|Verify broker license	As an Exchange Admin, I want to verify a broker has been licensed and certified so that I can confirm they are eligible to sell insurance within the Exchange. Acceptance Criteria: As an Exchange Admin, I want to verify a broker has been licensed and certified so that I can confirm they are eligible to sell insurance within the Exchange.	NY-HX (CM)/SHOP-Broker
1182	SER.I.1.Brokers/Agents|Broker sell insurance	As a Broker, I want to be able to sell insurance through the Exchange. Acceptance Criteria: Comments:	NY-HX (CM)/SHOP-Broker
1183	SER.I.6.Brokers/Agents|Notify process to insurers for broker pay	As the Exchange, I need a process that tells the insurer what to pay the brokers.	NY-HX (CM)/SHOP-Broker
1184	SER.I.4.Brokers/Agents|Manage book of business	As a Broker, I want to be able to manage my book of business.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1185	SER.I.1.Brokers/Agents|Broker referral	As the Exchange, I need to be able to refer employers and employees to brokers. Acceptance Criteria: As the Exchange, I need to be able to refer employers and employees to brokers.	NY-HX (CM)/SHOP-Broker
1187	SER.F.1.Appeals|Appeal rules	As the Exchange I would like to know what is appealable by an employer.	NY-HX (CM)/SHOP-Broker
1189	SER.E.2.Aggregate Premium|Employer pay premium	As an employer, I want to pay my premium through the Exchange. Acceptance Criteria: As an employer, I want to pay my premium through the Exchange.	NY-HX (CM)/SHOP-Broker
1191	SER.G.5.Monitor and Reconcile EE Enrollment|Discontinue QHP offering	As an employer, I would like to discontinue offering health insurance so that I do not have to continue paying for health care benefits. Acceptance Criteria: As an employer, I would like to discontinue offering health insurance so that I do not have to continue paying for health care benefits.	NY-HX (CM)/SHOP-Broker
1192	SER.G.1.Monitor and Reconcile EE Enrollment|Decrease cost of coverage	As an employer, I would like to decrease the cost of coverage offered to my employees (employer cost) so that I can afford employee coverage.	NY-HX (CM)/SHOP-Broker
1193	SER.G.5.Monitor and Reconcile EE Enrollment|Notify employer if QHP drop	As an employer, I want to receive a notice if a QHP discontinues coverage so that I am able to choose a new plan.	NY-HX (CM)/SHOP-Broker
1194	SEE.F.2.Re-Enrollment|Employee discontinue	As an employee, I want the option discontinue my health insurance so that I can explore other options.	NY-HX (CM)/SHOP-Broker
1195	SER.G.6.Monitor and Reconcile EE Enrollment|Notify employer if employee drop	As the Exchange, I want to notify the employer if the employee discontinues coverage so that the employer is aware for record keeping.	NY-HX (CM)/SHOP-Broker
1196	SEE.F.2.Re-Enrollment|Notify employee if QHP drop	As an employee, I want to receive a notice if a QHP discontinues coverage so that I am aware of eligibility for the special enrollment period and to know I am losing my health insurance.	NY-HX (CM)/SHOP-Broker
1197	SER.G.7.Monitor and Reconcile EE Enrollment|Notify IRS	As the Exchange, I want to notify the IRS for tax administration purposes if an employer stops offering insurance	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1198	SER.G.6.Monitor and Reconcile EE Enrollment|Open enrollment notice-employee	As the Exchange, I want to send a notice of the open enrollment period to the employee within the appropriate timeline so that they can choose a health insurance plan. Acceptance Criteria: As the Exchange, I want to send a notice of the open enrollment period to the employee within the appropriate timeline so that they can choose a health insurance plan.	NY-HX (CM)/SHOP-Broker
1199	SEE.F.1.Re-Enrollment|Open enrollment notice-employer	As the Exchange, I want to send a notice to the employer within the appropriate timeline of the employee open enrollment period so that they can enroll in a health insurance plan. Acceptance Criteria: As the Exchange, I want to send a notice to the employer within the appropriate timeline of the employee open enrollment period so that they can enroll in a health insurance plan.	NY-HX (CM)/SHOP-Broker
1204	SER.G.11.Monitor and Reconcile EE Enrollment|Confirmation of registration	As an employer, I want to receive confirmation that my information has been submitted.	NY-HX (CM)/SHOP-Broker
1205	SER.I.4.Brokers/Agents|Broker print client list	As a Broker (Producer) I want to be able to print information for my clients so that I can take it with me to meetings.	NY-HX (CM)/SHOP-Broker
1207	SER.B.3.Employer Register|Waiting period	As an employer, I would like to impose a waiting period on my employees who enroll in health coverage through my policy	NY-HX (CM)/SHOP-Broker
1208	SER.G.7.Monitor and Reconcile EE Enrollment|New enrollment	As the Exchange I want to be able to enroll new employees as they are hired so that they can get insurance.	NY-HX (CM)/SHOP-Broker
1313	OVR.C.2.APTC/CSR-CMS| Report SLCSP	As an Exchange Administrator, I wish to collect data from Eligibility and Enrollment regarding the Second Lowest Cost Silver Plan (SLCSP) so I can report it to CMS. I will need to get periodic reports from EE to do this, APTC reports from Issuers, APTC (and CSR) from CMS.	NY-HX (CM)/Individual
1314	OVR.C.2.APTC/CSR-CMS | Data Cleanse	As an exchange administrator, I want to receive APTC (and CSR) payment reports from CMS and perform. Data Quality cleansing to support matching. To do this, I will need to get information from eligibility and enrollment.	NY-HX (CM)/Individual
1315	FM.C.1.Core Bus Svce-A/R| Assign SHOP Receipts	As an Exchange Administrator, I wish to record all premiums from SHOP employers and assign them to an Issuer.	NY-HX (CM)/Financial Management

RTC ID	Summary	Description	Filed Against
1316	FM.C.1.Core Bus Svce-A/R| EFT to Issuer	As an Exchange Administrator, I need to transfer funds electronically to the Issuers of health care policies.	NY-HX (CM)/Financial Management
1317	FM.B.1. SHOP Prem Billing-Receipts| A/R SHOP coordination	As an Exchange Administrator, I want to receive payments from employers for SHOP premiums. Conversation: FM needs to coordinate with SHOP to determine what entity (State SFS or Exchange) is responsible for this role. Comments; Need stand-alone system if SFS cannot perform this task.	NY-HX (CM)/Financial Management
1318	FM.B.2. Ind Prem Billing-Issuers| Issuer EFT Info	As an Exchange Administrator, I need to collect banking information from Issuers to transfer funds electronically.	NY-HX (CM)/Financial Management
1319	FM.B.3. SHOP Prem Billing-A/R|Issuer Pmt Tracking	As an Exchange Administrator , I need to have a system in place to track payments made to the Issuers and resolve discrepancies.	NY-HX (CM)/Financial Management
1320	FM.B.3. SHOP Prem Billing-A/R|Non-EFT A/R	As an Exchange Administrator, I need to collect any receipts that do not flow through EFT.	NY-HX (CM)/Financial Management
1321	FM.B.3. SHOP Prem Billing-A/R| Issuer reconciliation	As an Exchange Administrator, I need to reconcile funds received through SHOP to that due the Issuer and resolve the differences.	NY-HX (CM)/Financial Management
1322	FM.B.3. SHOP Prem Billing-A/R| Transfer Schedule	As the Exchange Administrator, I need to make timely transfers of funds to Issuers that write coverage for SHOP employers' employees. Set up transfer schedule	NY-HX (CM)/Financial Management
1323	FM.C.1.Core Bus Svce-A/R| A/R System SFS	As an Exchange Administrator, I need to coordinate with the State Financial Services (SFS) to set up an accounting system that will record accounts receivable for the Exchange.	NY-HX (CM)/Financial Management
1324	FM.C.2.Core Bus Svce-A/P| SFS A/P	As an Exchange Administrator, I need to coordinate with the State Financial Services (SFS) to set up an accounting system that will record accounts payable for the Exchange.	NY-HX (CM)/Financial Management
1325	FM.D.4.Oversight-Separate duties|GL	As an Exchange Administrator, I need to coordinate with the State SMEs to reaserach a bookkeeping/accounting (GL) system for install in order to keep the books for the Exchange.	NY-HX (CM)/Financial Management
1326	FM.D.4.Oversight-Separate duties| Cash	.As an Exchange Administrator, I need to develop cash management (credit/debit) procedures to handle premium payments made by credit/debit card.	NY-HX (CM)/Financial Management

RTC ID	Summary	Description	Filed Against
1327	FM.D.1.Oversight-EE/Prem|EFT	As an Exchange Administrator, I need to develop a recording process to manage premium payments made by electronic funds transfer - individuals.	NY-HX (CM)/Financial Management
1328	FM.C.4.Core Bus Svce-Expenses| in-person pmts	As an Exchange Administrator, I need to develop cash management procedures to handle premium payments made in person.	NY-HX (CM)/Financial Management
1330	FM.D.3.Oversight-Calc User Fee|notification	Premium Processing/Issuer Pmt Mgmt . Spike: Will Exchange be required to calculate user fee assessments on Issuers if the state elects this option. If so, who notifies issuers of user fee.	NY-HX (CM)/Financial Management
1331	FM.D.4.Oversight-Reconciliaiton| data flow SHOP FM	SHOP Premium Processing- Data flow SHOP/FM. Spike: As the Financial management Team, I need to coordinate with the SHOP Team to make sure data flows back and forth between SHOP and Finance.	NY-HX (CM)/Financial Management
1332	FM.D.3.Oversight-Fee spread| Calculate	Using the methodology developed by the state, prepare the calculation for user fees Calculation Bring through billing - aggregate	NY-HX (CM)/Financial Management
1334	FM.B.3. SHOP Prem Billing-Reconcile| update database	As an Exchange Operator I want to be able to resolve discrepancies in premiums aggregated for Employers and updated. Conversation: Reconcile employer account discrepancies; update database.	NY-HX (CM)/Financial Management
1335	FM.B.3. SHOP Prem Billing-Reconcile| Monthly	Send monthly bill.As an Exchange Administrator I want to aggregate premium receipts from Employers and distribute these to Issuers. Coversation: Exchange sends a monthly premium invoice to the Employer. As an Exchnage Operator, I want to set up a monthly report analyzing discrepancies in the premium invoicing for SHOP employer accounts and updtae the database	NY-HX (CM)/Financial Management
1336	FM.D.3.Oversight-Agg QHP premium|user fee data	Aggregate QHP Premium for Fees calc. As an Exchange Operator, I need to record premiums written by NY-HX QHPs to compile data for user fee calculations.	NY-HX (CM)/Financial Management

RTC ID	Summary	Description	Filed Against
1337	FM.D.3.Oversight-Aggregate|GL SHOP Premium	GL entries discrepancies.As an Exchange Administrator I want to be able to resolve discrepancies in premiums aggregated for Employers. Conversation: Create credit/debit transactions that can resolve account discrepancies.	NY-HX (CM)/Financial Management
1339	FM.A.1.APTC/CSR-EE data	APTC/CSR 1a. reports to CMS issuer pmts. As an Exchange Operator,I want to compile (APTC and CSR) statistical reports from EE to record amounts of payments Issuers will receive in order to reconcile these at Issuer level.	NY-HX (CM)/Individual
1340	OVR.C.2.APTC/CSR-CMS l Match Records	APTC/CSR 1b. attribute CMS data to Issuer. As an Exchange Operator, I want to compile APTC (and CSR) statistic reports from Issuer . Match individuals between HHS and Issuer records - exact matches, partial matches, false positives, false negatives.	NY-HX (CM)/Individual
1341	FM.A.3b.SLCSP Data to HHS l Report Exchange Enrollment Data to HHS	APTC/CSR 3a. EE APTC data to HHS. As an Exchange Operator, I want to report Exchange enrollment data to HHS on a monthly basis. Conversation : The monthy report to HHS should include individual enrollment in QHP for the upcoming month and the amounts of APTCs (and CSRs), associated with those individuals. Comments: Will we still have to collect this data for CSR?	NY-HX (CM)/Individual
1342	FM.A.3.APTC/CSR-EE SLCSP l Report Exchange Enrollment Data to HHS	APTC/CSR 3b. EE SLCSP data to HHS. As an Exchange Operator, I want to report Exchange enrollment data to HHS on a monthly basis. Conversation : The monthy report to HHS should include changes in individual enrollment in QHP for the upcoming month and the amounts of SLCSP associated with those individuals. Comments: Will we still have to collect this data for CSR?	NY-HX (CM)/Individual
1343	FM.A.3.APTC/CSR-Fam Sz l Report Exchange Enrollment Data to HHS	APTC/CSR 3c. EE Family Size data to HHS . As an Exchange Operator, I want to report Exchange enrollment data to HHS on a monthly basis. Conversation : The monthy report to HHS should include changes in individual enrollment in QHP for the upcoming month and the Income, associated with those enrolled individuals. Comments: Will we still have to collect this data for CSR?	NY-HX (CM)/Individual

RTC ID	Summary	Description	Filed Against
1344	FM.A.3.APTC/CSR-EE Income | Monthly report	APTC/CSR 3d. EE Income data to HHS. As an Exchange Operator, I want to report Exchange enrollment data to HHS on a monthly basis. Conversation: The monthy report to HHS should include changes in individual enrollment in QHP for the upcoming month and the amounts of APTCs (and CSRs), Family Size, Income, and SLCSP associated with those individuals. Comments: Will we still have to collect this data for CSR?	NY-HX (CM)/Individual
1345	FM.A.4.APTC/CSR-HHS l Received APTC (and CSR) Payment Reportd from HHS	APTC/CSR 4a. APTC from HHS data cleanse. As an Exchange Operator, I want to receive APTC (and CSR) payment reports from HHS and perform data quality cleansing to support matching. To do this, I will need to get information from HHS.	NY-HX (CM)/Individual
1346	FM.A.4.APTC/CSR-Issuer l Report APTC (and CSR) Statistics	APTC/CSR 4b. Annual EE data cleanse. As an Exchange Operator, I want to report APTC (and CSR) statistics as well as those regarding income, Family size, SLCSP. To do this, I will need to get information from QHPs to CMS on an annual basis.	NY-HX (CM)/Individual
1347	FM.A.4.APTC/CSR-EE Cleanse l Received Eligibility Change Reports	APTC/CSR 4c. Eligibility change from EE data cleanse. As an Exchange Operator, I want to receive Eligibility Change reports from EE and perform data quality cleansing to support matching. To do this, I will need to get information from Eligibility and Enrollment.	NY-HX (CM)/Individual
1348	FM.B.1. SHOP Prem Billing-Paid | Paid	SHOP Premium Processing- 1a. Aggregate Pd. As an Exchange Operator, I want to be able to resolve discrepancies in premiums aggregated for Employers. Conversation: Maintain Employer account with amount paid . Comment : search Invoice data query.	NY-HX (CM)/Financial Management
1349	FM.B.1. SHOP Prem Billing-ER Roster | ER Roster	SHOP Premium Processing 1a. ER Roster bill. As an Employer I want to be able to set up a roster of employees for aggregated premium collection Edit controls for Employee Roster Page. Conversation: We need this information for reporitn purposes. Comment: Done in SHOP.	NY-HX (CM)/Financial Management

RTC ID	Summary	Description	Filed Against
1350	FM.B.1. SHOP Prem Billing-Receipts | Receipts	SHOP Premium Processing- 1b. A/R -SHOP receipts- EFT. As an Exchange Operator, I want to aggregate premium receipts from Employers and distribute them to Issuers. Conversation: Exchange (SFS) receives and processes a EFT premium payment (or other) from an Employer.	NY-HX (CM)/Financial Management
1351	FM.B.2. Ind Prem Billing to HHS l Send Verified Indiv. Prem Pay History Reports to HHS	Ind Premium Processing 2b. Ind to CMS. As an Exchange Operator, I want to send verified individual premium payment history reports, after receiving these reports from Issuers, to HHS Conversation: Issuers will need to supply information to the Exchange in order that we may calculate premiums due. Comment; Do we need to record any individual premium offsets?	NY-HX (CM)/Individual
1352	FM.B.2. Ind Prem Billing-Issuers l Individual Premium Payment History Reports	Ind Premium Processing 2b. from Issuers. As an Exchange Operator, I want to receive individual premium payment history reports from Issuers in order that I may supply them to CMS. Conversation: I need to develop a process to receive and verify reports.	NY-HX (CM)/Individual
1353	FM.B.3. SHOP Prem Billing-Reconcile | Reconcile	SHOP Premium Processing- 3a. Reconcile, Update. As an Exchange Operator I want to be able to resolve discrepancies in premiums aggregated for Employers and updated. Conversation: Reconcile employer account discrepancies; update database.	NY-HX (CM)/Financial Management
1354	FM.B.3. SHOP Prem Billing-A/R | Prem Billing-A/R	SHOP Premium Processing- 3b. Aged A/R. As an Exchange Operator, I want to be able to resolve discrepancies in premiums aggregated for Employers. Conversation: Aged Accounts/Receivable by Employer. Comment: data load from SFS will allow Exchange to develop report.	NY-HX (CM)/Financial Management
1355	FM.B.3. SHOP Prem Billing- Collections | Collections	SHOP Premium Processing-3bi. A/R -Collections. As an Exchange Operator, I need to develop a collections strategy to collect full premiums from SHOP employers.	NY-HX (CM)/Financial Management
1356	FM.B.3. SHOP Prem Billing-Cancel | Cancel	SHOP Premium Processing- 3bii A/R - Cvg Cancel. As an Exchange operator, I need a mechanism to manage non-payment of SHOP premium so the Exchnage can collect ornotify Issuer to cancel coverage.	NY-HX (CM)/Financial Management

RTC User Story Descriptions

RTC ID	Summary	Description	Filed Against
1357	FM.B.3. SHOP Prem Billing-Late | Late	SHOP Premium Processing- 3c A/R - Late Pmts. As an Exchange operator, I need a mechanism to manage payments to Issuers that employers send late.	NY-HX (CM)/Financial Management
1358	FM.C.1.Core Bus Svce-A/R | A/R	Core Bus Svces/Issuer Pmt Mgmt- 1. A/R Gen'l. As an Exchange Operator, I need to Record all funds collected and enter them into an accounts receivable ledger.	NY-HX (CM)/Financial Management
1359	FM.C.2.Core Bus Svce-A/P | A/P	Core Bus Svces/Issuer Pmt Mgmt - 2. A/P -Distribute Monies to Issuers. As an Exchange Operator, I want to distribute premiums to an Issuer Conversation: In order to do this, I need to aggregate premiums, collect user fee and expense information and apply any offsets for fees, enrollments changes and cancellations to the premium prior to transferring it either electronically or some other means. I al;so ned to make transfers on a timely basis.	NY-HX (CM)/Financial Management
1360	FM.C.2.Core Bus Svce-Offset|Premiums User Fees	As an Exchange Operator, I need to offset any premiums sent to Issuers by users fees charged to manage the Exchange. Offset Monies Paid by User Fees.	NY-HX (CM)/Financial Management
1361	FM.C.3.Core Bus Svce-Inv | Permissable	As an Exchange Operator, I need to ensure that the funds collected from employers for SHOP premiums are held in an investment instrument the meets OSC standards and requirements. Permissable Investments	NY-HX (CM)/Financial Management
1362	FM.C.3.Core Bus Svce-Bank|Cash Mgmt	As an Exchange Operator, I need to ensure the receipts from SHOP premiums are deposited in the bank (treasury). Core Bus Svces/Issuer Pmt Mgmt-3b. Cash Mgmt - Bank.	NY-HX (CM)/Financial Management
1363	FM.C.4.Core Bus Svce-Expenses|Checkwriting	As an Exchange Operator, I must have a documented practice for handling general expenses including authorities and permissions for checkwriting/wire transfers.	NY-HX (CM)/Financial Management
1364	FM.C.4.Core Bus Svce-HR|HR Policies	As an Exchange Operator, I must have a documented practice for Human resources procurement and on boarding.	NY-HX (CM)/Financial Management
1365	FM.C.4.Core Bus Services-FFE | Procurement Policy	As an Exchange Operator, I must have a documented practice for furniture fixtures and equipment procurement.	NY-HX (CM)/Financial Management

RTC ID	Summary	Description	Filed Against
1366	FM.C.5.Core Bus Svce-Budget|Annual	As an Exchange Operator , I need to maintain an accounting system that will track all of my expenses and revenues so I can determine what my total annual expenditures are. Annual Budget	NY-HX (CM)/Financial Management
1367	FM.C.6.Core Bus Svce-Grants	As an Exchange Operator, I must ensure that I have system in place to track Navigator and other grants.	NY-HX (CM)/Financial Management
1368	FM.C.7.Core Bus Svce-User Fee|Policy	Core Bus Svces/Issuer Pmt Mgmt-User Fee Policy. As a state regulator, I need to know what the revenues and expenses are from the NY HX so that I can develop a policy for collecting user fees.	NY-HX (CM)/Financial Management
1369	FM.D.1.Oversight-OSC | Cash Flow	As an Exchange Operator, I need to develop a report that provides details about the flow of funds to the state comptroller's office.	NY-HX (CM)/Financial Management
1370	FM.D.1.Oversight-B/S | Report	As an Exchange Operator, I must ensure that I have system in place to generate Balance Sheet as required. Formulate report	NY-HX (CM)/Financial Management
1371	FM.D.1.Oversight-I/S | Report	As an Exchange Operator, I must ensure that I have system in place to generate an Income Statement as required. Formulate Report	NY-HX (CM)/Financial Management
1372	FM.D.1.Oversight-EE/Prem | EE Premium data	As an Exchange Operator, I want to be able to calculate enrollment and premium data to forward to the appropriate state agencies.	NY-HX (CM)/Financial Management
1373	FM.D.2.Oversight-premium to CMS | Collect data	As an Exchange Operator, I need to develop a report that provides details about the premiums written by Issuers to CMS.	NY-HX (CM)/Financial Management
1375	FM.D.3.Oversight-Prem deductions | User Fees	As an Exchange Operator, I want to be able to calculate user fee assessments on Issuers if the state elects this option. Business Rule: calculate deductions from premiums such as user fees if deduction is the option chosen by the state.	NY-HX (CM)/Financial Management
1376	FM.D.3.Oversight-Calc User Fee|	As an Exchange Operator, I want to be able to calculate and collect user fee assessments on Issuers if the state elects this option. Business Rule: calculate user fees according to state-determined user fee formula.	NY-HX (CM)/Financial Management

RTC ID	Summary	Description	Filed Against
1377	FM.D.3.Oversight-Collect User Fee | Collect	As an Exchange Operator, I want to be able to calculate user fee assessments on Issuers if the state elects this option. Collect fees from issuers, if not deducted from premium payments.	NY-HX (CM)/Financial Management
1378	FM.D.3.Oversight-Pay | Pmt less fees	As an Exchange Operator, I want to make aggregate premium payments to Issuers less fees (Coverage Adjustments, APTC, Users fees, if necessary) calculated.	NY-HX (CM)/Financial Management
1379	FM.D.3.Oversight-Notify User Fee | Bill	As an Exchange Operator, I want to be able to calculate user fee assessments on Issuers if the state elects this option. Conversation: Exchnage must be able, with data available, to both calculate user fee and Notify issuers of user fee.	NY-HX (CM)/Financial Management
1380	FM.D.3.Oversight-Update | Issuer	As an Exchange Operator, I want to be able to calculate user fee assessments on Issuers if the state elects this option. Conversation: Calculate User fee and Update Issuer Accounts to offset premiums due.	NY-HX (CM)/Financial Management
1381	FM.D.4.Oversight-Separate duties|Policy Manual	As an Exchange Operator, I must ensure that I have a proper written policy/procedure to separate duties to avoid conflicts and remain compliant with ethical and legal standards. Author/document policy/procedure manual	NY-HX (CM)/Financial Management
1382	FM.D.4.Oversight-Audit | Feds	As an Exchange Operator, I must ensure that I am prepared for audit or examination by federal authorities.	NY-HX (CM)/Financial Management
1383	FM.D.4.Oversight-Reconciliaiton | OSC	As an Exchange Operator, I must ensure that the reconciliaitons done are compiled by the Exchange are available for audit an examination by the OSC	NY-HX (CM)/Financial Management
1384	FM.D.4.Oversight-Compliance | Storage	As an Exchange Operator, I must ensure that the books and records compiled by the Exchange are held in a secure environment for no less than ten (10) years.	NY-HX (CM)/Financial Management
1385	FM.D.3.Oversight-Fee spread | Non-QHP	As a state regulator, I need to develop a policy for collecting user fees.Conversation: I need to determine if the fee spread would be detrimental to the Issuers who are QHPs and if so, possible expand the user fee base to include carriers outside the exchange. Fee Spread.	NY-HX (CM)/Financial Management

RTC ID	Summary	Description	Filed Against
1386	FM.D.3.Oversight-Aggregate | All Carriers data	As an Exchange Operator, I need to access premiums written by all NYS carriers identified by the DFS for user fee calculations. -Aggregate NYS Issuer Premims from DFS.	NY-HX (CM)/Financial Management
1387	FM.D.3.Oversight-Agg QHP premium | Record premium	. As an Exchange Operator, I need to record premiums written by NY-HX QHPs to compile data for user fee calculations.	NY-HX (CM)/Financial Management
1388	FM.D.3.Oversight-Bill User Fee|system	As an Exchange Operator, I need to develop a billing and collections system for user any fees chosen by the State.	NY-HX (CM)/Financial Management
1389	FM.D.3.Oversight-Fee formula | Calculation	As an Exchange Operator, I need to calculate User fees using the formula developed by the state regulators.	NY-HX (CM)/Financial Management
1390	FM.D.3.Oversight-Fee Offset | QHP	As an Exchange Operator, I need to develop a system whereby any user fees charged to QHPs can be deducted from their premiums due.	NY-HX (CM)/Financial Management
1391	FM.E.4.Risk Data-EE design feed|	As an Exchange Operator, I want to report Exchange enrollee and plan data to DFS and to HHS to participate in risk spreading programs. Conversation: data Design data feed to reinsurance entity/DFS.	NY-HX (CM)/Financial Management
1392	FM.E.4.Risk Data-EE data send	As an Exchange Operator, I want to report Exchange enrollee and plan data to DFS and HHS to participate in risk spreading programs. Conversation: Send data feed to reinsurance entity/DFS.	NY-HX (CM)/Financial Management
1393	FM.E.4.Risk Data-EE data feed	As an Exchange Operator, I want to report Exchange enrollee and plan data to DFS and to HHS to participate in risk spreading programs. Conversation: Create data feed to reinsurance entity/DFS.	NY-HX (CM)/Financial Management
1394	FM.E.3.Risk Data-summary | Claims Encounter data	As a state regulator, I want to collect claims and encounter data from small group and individual markets so I can calculate risk adjustments. Conversation: Create detail and summary records of processing received claims/encounter data. Comments: will we need to record this for future use by NYS reinsurance entity.	NY-HX (CM)/Financial Management

RTC ID	Summary	Description	Filed Against
1395	FM.E.3.Risk Data-design feed | design	As a state regulator, I want to collect claims and encounter data from small group and individual markets so I can calculate risk adjustments. Conversation: Data design claims and encounter data feed. Comments: will we need to collect this in anticipation of NYS taking over reinsurance product (ie: data manipulation). Design data feed	NY-HX (CM)/Financial Management
1396	FM.E.3.Risk Data-non grandfathered | Claims Encounter data	As a state regulator, I want to collect claims and encounter data from small group and individual markets so I can calculate risk adjustments. Conversation: Receive claims/encounter data from non-grandfathered plans (individual and small group) in the state. Comments: will we need to collect this in anticipation of NYS taking over reinmsurance plan (ie data review).	NY-HX (CM)/Financial Management
1397	FM.F.3.Risk Mgmt-design | Enrollee data	As an Exchange Operator, I want to extract enrollee data so the feds can calculate risk adjustment payments and charges. Conversation: data design for Exchange enrollee extract.	NY-HX (CM)/Financial Management
1398	FM.F.3.Risk Mgmt-extract | Enrollee data	As an Exchange Operator, I want to extract enrollee data so the state can calculate risk adjustment payments and charges. Conversation: Send exchange enrollee data for risk adjustment calculation to CMS. Enrollee data extract	NY-HX (CM)/Financial Management
1399	FM.F.2.Risk Mgmt-collect|data design	As DFS, I want to collect claims and encounter data from small group and individual markets so I can calculate risk adjustments. Conversation: Use data collected in Risk spreading programs [Story #]to create data design for enrollee/premium data bound for DFS/HHS.	NY-HX (CM)/Financial Management
1400	FM.F.4.Risk Mgmt-send data | Reinsurer	As a state regulator, I want to collect claims and encounter data from small group and individual markets so I can calculate risk adjustments. Conversation: Send data to reinsurance entity reinsurance entity.	NY-HX (CM)/Financial Management
1404	EE.H.2.Renew Eligibility | Eligibility Renewal	As a consumer, I would like to renew my eligibility and enrollment for myself and/or members of my household so enrollment into the NY HX can be maintained.	NY-HX (CM)/Individual

RTC ID	Summary	Description	Filed Against
1405	EE.F.6.Renew Exemption | Renew Exemption	As a consumer I want to renew my Exemption in order to not obtain insurance.	NY-HX (CM)/Individual
1406	OVR.C.1 Enrollment Reporting and Recon l Periodic Enrollment Reporting	As the Exchange, I would like to conduct periodic enrollment reporting and reconciliation	NY-HX (CM)/Individual
1408	EE.B.2g.Establish User Roles and Role Based Security | Establish User Roles	As the exchange, I need to establish user roles and role based security in order to comply with HIPAA, NIST and FIPS security standards.	NY-HX (CM)/Individual
1409	OVR.B.1-10.Auditing of Date l Establish Auditing of Data	As the exchange, I need to establish auditing of data, updates, and other changes in order to maintain oversight and control.	NY-HX (CM)/Individual
1410	OVR.A.4-5.Date Management (Inclusive of Download and Upload) l Provide Mechanism for Data Management	As the exchange, I need to provide a mechanism for data management support inclusive of data download, upload, data deletion (application withdrawal), summary pages, printable documents in order to meet requirements.	NY-HX (CM)/Individual
1411	EE.B.9.Consumer Dashboard l User Progress Bar	As the Exchange, I need to provide a progress bar that gives the user a sense of where they are in the process and how long it will take them to complete the application in order for the consumer to have a better user experience.	NY-HX (CM)/Individual
1412	EE.B.9.Consumer Dashboard | Consumer Dashboard	As a consumer I want to be presented with a dashboard that shows all account data, the status of my Application, any current Coverage information, a means to notify the HX of Changes in my circumstances, as well as a means to down load PDF copies of all notices ever sent to me.	NY-HX (CM)/Individual
1413	EE.B.12.Indicate Notice Preferences | Indicate Preferences for Receiving Copies of Notices	As a Consumer I want to be able to tell the exchange what my preferences are for receiving copies of notices and other information from the exchange	NY-HX (CM)/Individual
1414	EE.E.6.Enrollment Exceptions| Notification of Enrollment Issues and Allow to Correct	As a consumer I want the exchange to notify me of any issues that arise in the enrollment process and let me fix anything in my control	NY-HX (CM)/Individual
1415	EE.B.7c.Electronic Signature | Electronic Signature	As a Consumer I want to be able to electronically sign my application so I can complete the application process.	NY-HX (CM)/Individual
1416	EE.B.7b.Designate Third Party for Notices | Designate Third Part for Notices	As a consumer I want to be able to designate a third party to receive notices	NY-HX (CM)/Individual

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RTC ID	Summary	Description	Filed Against
1419	EE.B.3.Extended information for QHP and Insurance Affordability | Extended information for QHP and Insurance Affordability	As a Consumer I want to give no more than the minimum amount of information necessary to evaluate eligibility for QHPs and Insurance Affordability Programs.	NY-HX (CM)/Individual
1420	EE.A.5.Help deririving income | Help Deriving Income	As a Consumer I want help deriving my income	NY-HX (CM)/Individual
1422	OVR.B.1-10.Fed and State Security Requirements l Comply with Federal and State Security Reqirements	As the exchange, I want the web site to comply with all Federal and State Required Security requirements.	NY-HX (CM)/Individual
1426	OVR.B.1-10.Log Modications Made to Records l Track Record Modifications	As the exchange, I want the system to track and log all modifications made to records in the exchange.	NY-HX (CM)/Individual
1427	OVR.B.1-10.Store History of Account Changes l Store Copies of Account Record	As the exchange, I want to store previous copies of each account record.	NY-HX (CM)/Individual
1428	OVR.C.2 Send Reporting Data to the Feds l Reporting Data to Federal Government	As the exchange, I want the ability to send reporting data to the Federal Government	NY-HX (CM)/Individual
1429	OVR.C.2.Notify MMIS of Medicaid and CHP Eligibility l Medicaid and CHP Eligibility Determinations	As the exchange, I want to notify the MMIS of Medicaid and CHP eligibility determinations.	NY-HX (CM)/Individual
1430	Pre load Medicaid and CHP member info	As the Exchange, I want to have existing Medicaid and CHP member information pre-loaded into the system	NY-HX (CM)/Individual
1441	EE.Provide Notices| Send Notice to User	As the exchange, I need to create notices that will be sent to exchange users to notify of determinations including appeals, renewals, eligibility determination and request for additional documentation.	NY-HX (CM)/Individual
1448	O.A.1.Multiple Browsers | Multiple Browsers	As a NY-HX user I want to access the exchange via: IE 8 or 9, Firefox x or x, Chrome y or y, and Safari	NY-HX (CM)/Oversight and General
1449	OVR.A.2.Multiple Languages | Multiple Languages	As a NY-HX user I want the option to select multiple languages	NY-HX (CM)/Oversight and General
1450	OVR.A.3.Static Information | Static Information	As the NY-HX user I want to view all pages of static information on the NY-HX	NY-HX (CM)/Oversight and General

RTC ID	Summary	Description	Filed Against
1451	OVR.A.4.Download Documents | Download Documents	As a NY-HX user I want to download documents	NY-HX (CM)/Oversight and General
1452	OVR.A.5.Up-Load Documents | Up-Load Documents	As a NY-HX user I want to up-load documents to NY-HX	NY-HX (CM)/Oversight and General
1453	OVR.B.1.Consumer Create Account | Consumer Create Account	As a consumer I want to create an account Uname/PW	NY-HX (CM)/Oversight and General
1454	OVR.B.10.Restrict Data Element Access | Restrict Data Element Access	As an NY-HX Administrator I want to restrict access for other users to the data element level	NY-HX (CM)/Oversight and General
1455	OVR.B.10.Restrict Data Element Access | Identify Data Element Access	As an NY-HX Administrator I need to identify the roles and responsibilities for users needing access to the data element level	NY-HX (CM)/Oversight and General
1456	OVR.B.10.Restrict Data Element Access | User Data Element Access	As an NY-HX Administrator I need to know what data elements a user would need access to in order to fulfill their responsibilities	NY-HX (CM)/Oversight and General
1457	OVR.B.2.Sys Admin Account | Sys Admin Account	As an NY-HX Systems Administrator I want to create accounts Uname/PW for back-office users	NY-HX (CM)/Oversight and General
1458	OVR.B.2.Sys Admin Account | Sys Admin Reset	As an NY-HX Systems Administrator I want to reset accounts Uname/PW for back-office users	NY-HX (CM)/Oversight and General
1459	OVR.B.2.Sys Admin Account | Sys Admin Deactivate	As an NY-HX Systems Administrator I want to deactivate accounts Uname/PW for back-office users	NY-HX (CM)/Oversight and General
1460	OVR.B.2.Sys Admin Account | Sys Admin Reactivate	As an NY-HX Systems Administrator I want to reactivate accounts Uname/PW for back-office users	NY-HX (CM)/Oversight and General
1461	OVR.B.3.Batch Creation | Batch Creation	As an NY-HX Systems Administrator I want to create a batch of Usernames/PW e.g. group of Navigators complete requests and are ready to start using NY-HX	NY-HX (CM)/Oversight and General
1462	OVR.B.4.Deactivate User | Deactivate User	As an NY-HX Systems Administrator I want to deactivate front end users	NY-HX (CM)/Oversight and General
1463	OVR.B.5.Re-Activate User | Re-Activate User	As an NY-HX Systems Administrator I want to reactivate front end users	NY-HX (CM)/Oversight and General
1464	OVR.B.6.Role Based Access | Role Based Access	As an NY-HX Systems Administrator I want to manage role-based access for users	NY-HX (CM)/Oversight and General
1465	OVR.B.7.CSR Manage Role | CSR Manage Role	As the NY-HX customer service representative agency I want to manage role based access for front end users	NY-HX (CM)/Oversight and General

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RTC ID	Summary	Description	Filed Against
1466	OVR.B.7.CSR Manage Role | CSR Create Account	As the NY-HX customer service representative agency I want to create accounts Uname/PW for CSR users	NY-HX (CM)/Oversight and General
1467	OVR.B.7.CSR Manage Role | CSR Reset Account	As the NY-HX customer service representative agency I want to reset accounts Uname/PW for CSR users	NY-HX (CM)/Oversight and General
1468	OVR.B.7.CSR Manage Role|CSR Deactivate Account	As the NY-HX customer service representative agency I want to deactivate accounts Uname/PW for CSR users	NY-HX (CM)/Oversight and General
1469	OVR.B.7.CSR Manage Role|CSR Reactivate Account	As the NY-HX customer service representative agency I want to reactivate accounts Uname/PW for CSR users	NY-HX (CM)/Oversight and General
1470	OVR.B.9.Restrict Table Access | Restrict Table Access	As an exchange administrator I want to restrict access for other users to the table level	NY-HX (CM)/Oversight and General
1471	OVR.B.9.Restrict Table Access | Identify Table Access	As an exchange administrator I need to identify the roles and responsibilities for users needing access to the table.	NY-HX (CM)/Oversight and General
1472	OVR.B.9.Restrict Table Access | User Table Access	As an exchange administrator I need to know what table a user would need access to in order to fulfill their responsibilities.	NY-HX (CM)/Oversight and General
1473	OVR.B.10.Navigator Manage Role | Navigator Manage Role	As the NY-HX Navigator agency I want to manage role based access for users	NY-HX (CM)/Oversight and General
1474	OVR.B.10.Navigator Manage Role | Navigator Create Account	As the NY-HX Navigator agency I want to create accounts Uname/PW for navigator users	NY-HX (CM)/Oversight and General
1475	OVR.B.10.Navigator Manage Role | Navigator Reset Account	As the NY-HX Navigator agency I want to reset accounts Uname/PW for navigator users	NY-HX (CM)/Oversight and General
1476	OVR.B.10.Navigator Manage Role | Navigator Deactivate Account	As the NY-HX Navigator agency I want to deactivate accounts Uname/PW for navigator users	NY-HX (CM)/Oversight and General
1477	OVR.B.10.Navigator Manage Role | Navigator Reactivate Account	As the NY-HX Navigator agency I want to reactivate accounts Uname/PW for navigator users	NY-HX (CM)/Oversight and General
1478	OVR.C.1.Ad Hoc reporting | Ad Hoc Reporting	As an NY-HX Administrator I need to produce ad-hoc inquiry reports about NY HX user activity	NY-HX (CM)/Oversight and General
1479	OVR.C.2.User Created Report | User Created Report	As an NY-HX Administrator I need to produce a report that will run periodically for external submissions	NY-HX (CM)/Oversight and General
1480	OVR.C.2.User created report | Identify Reports	As an NY-HX Administrator I need to identify the types and frequency of reports needed for submission to external agencies	NY-HX (CM)/Oversight and General
1481	OVR.C.3.Management Reports | Management Reports	As an NY-HX Manager I need reports to monitor and manage	NY-HX (CM)/Oversight and General

RTC ID	Summary	Description	Filed Against
1482	OVR.C.3.Management Reports | Produce Reports	As an NY-HX Manager I need the system to produce reports to assist me in monitoring and managing the Exchange operations	NY-HX (CM)/Oversight and General
1483	OVR.D.1.Generic Template | Generic Template	As an NY-HX Administrator I want to develop a Generic Template for Notices	NY-HX (CM)/Oversight and General
1484	OVR.D.1.Generic Template | Identify Triggers	As an NY-HX Administrator I need to identify the triggers and periodicity for generating notices	NY-HX (CM)/Oversight and General
1485	OVR.D.1.Generic Template | Identify Types	As an NY-HX Administrator I need to identify all types of notices that need to be created by the Exchange	NY-HX (CM)/Oversight and General
1486	OVR.D.2.Distribute Notices | Distribute Notices	As an NY-HX Administrator I want to distribute notices via multiple channels	NY-HX (CM)/Oversight and General
1487	OVR.D.2.Distribute Notices| Identify Channels	As an NY-HX Administrator I need to identify all channels for the distribution of notices, i.e. mail, email, modal, etc.	NY-HX (CM)/Oversight and General
1488	OVR.D.3.Display Notices | Display Notices	As an NY-HX Administrator I want to display notices in NY-HX (similar to Outlook Inbox or FFE approach)	NY-HX (CM)/Oversight and General
1489	OVR.D.4.Inbox Message | Inbox Message	As an NY-HX Administrator I want to place a notice/message from within the NY-HX into a User's Inbox	NY-HX (CM)/Oversight and General
1491	SER.B.4.Employer Register|Receive exception message	As an Employer or Broker, I can receive exception message for application so that I know if my application was acceptable or not	NY-HX (CM)/SHOP-Broker
1492	SER.B.4.Employer Register|Verify and send exception notice.	As the Exchange administrator I need to be able to verify an application and send exception notification if the application fails to load properly.	NY-HX (CM)/SHOP-Broker
1493	SER.B.6.Employer Register|Upload form documents (Form 45) to validate it's a small business	As an Employer/Broker I need to be able to upload a required documentation for SHOP so that I can prove I am a small employer	NY-HX (CM)/SHOP-Broker
1494	SER.B.6.Employer Register|Upload form documents (Form 45) to validate it's a small business	As the Exchange administrator I need to be able to validate (form 45) to confirm business type(Small)	NY-HX (CM)/SHOP-Broker
1495	SER.B.7.Employer Register|Create electronic verification of valid NYS employer	As the Exchange Administrator I need to connect to an external database to verify that a NY employer is a valid NY employer	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1496	SER.B.7.Employer Register|Create electronic verification of valid NYS employer	As an Exchange administrator I need to test the process that verifies the validity of NYS small employers	NY-HX (CM)/SHOP-Broker
1497	SER.B.8.Employer Register|consistent application	As an employer I would like my application on the Exchange to be consistent with the application used by individuals	NY-HX (CM)/SHOP-Broker
1498	SER.B.8.Employer Register|Pull anonymous browsing info	As an employer I need the Exchange to pull any information that I entered on the individual page when I was anonymously browsing so I can register myself as an employer	NY-HX (CM)/SHOP-Broker
1500	SER.E.5.Aggregate Premium|test notification process	As the Exchange administrator I need to send a test notification to employer/insurer so that they are aware of my calculated premium aggregations.	NY-HX (CM)/SHOP-Broker
1501	SER.E.5.Aggregate Premium|Verify notice sent	As the Exchange administrator I need to verify grace premium notification sent to employers at regular intervals(change in premium or address change) so that the system is up to date with the latest employer information	NY-HX (CM)/SHOP-Broker
1502	SER.F.2.Appeals|Notification to tell employer what failed	As the Exchange administrator I need to send notification to an employer who has submitted an appeal with the appropriate reason for their application failure so that they can correct the information and resubmit	NY-HX (CM)/SHOP-Broker
1505	SER.F.3.Appeals|Intake|Receive an employer appeal	As the Exchange administrator I need a process to intake employer appeal notices so that a proper application determination can be made.	NY-HX (CM)/SHOP-Broker
1506	SER.G.10.Monitor and Reconcile EE Enrollment|Directing ER to 800 number or mailing address	As an employer I want to be able to send contact information to my employees regarding application in health benefits that I have chosen for them through the Exchange so they can enroll.	NY-HX (CM)/SHOP-Broker
1508	SER.G.3.Monitor and Reconcile EE Enrollment|Receive first invoice	As an Employer, I need to receive first invoice from the Exchange so that I can pay my bill for health insurance	NY-HX (CM)/SHOP-Broker
1509	SER.G.3.Monitor and Reconcile EE Enrollment|First Invoice	As an employee I want to receive my first invoice from the Exchange so I can begin health coverage and pay my bill (depends on employer registration.)	NY-HX (CM)/SHOP-Broker
1510	SER.G.2.Monitor and Reconcile EE Enrollment|Present P/R deduction schedule	As an employer I want to be able to receive payroll deduction information for my employees so I can keep my records up to date	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
1511	SER.G.2.Monitor and Reconcile EE Enrollment|Present P/R deduction schedule	As an Exchange adminstrator I have to test the payroll decuction for an employer, using updated employer data, so my calculations are accurate	NY-HX (CM)/SHOP-Broker
1513	SER.B.8.Employer Register|Pull applicable EE - Page 1	As the Exchange I would like to pull similar information as the individual track in retrieving employer registration information	NY-HX (CM)/SHOP-Broker
1517	PM.B.1.Annual Load MMC | Define a Parser to parse the Medicaid data using Informatica	As the Exchange Administrator, I want to ensure that a Parser to parse the Medicaid data using Informatica is defined.	NY-HX (CM)/Plan Management
1519	PM.B.1.Annual Load MMC | Validate Medicaid data against the technical and business rules	As an Exchange Administrator, I want to ensure that Medicaid data is validated against the technical and business rules. - CAN'T CLOSE - See Dependency - Claimed 16 out of 20 points	NY-HX (CM)/Plan Management
1522	PM.B.1.Annual Load MMC | Define workflow for Medicaid Plan Template	As an Exchange Administrator, I want to ensure that workflows for Medicaid Plan Template are defined. - CAN'T CLOSE - See Dependency - Claimed 16 out of 20 Points	NY-HX (CM)/Plan Management
1523	PM.B.2.Annual Load CHIP | Define workflow for CHIP Plan Template	As an Exchange Administrator, I want to ensure that workflow for CHIP Plan Template is Defined. Description1. Identify the workflow items to be made part of the BPEL workflow process 2. Define a web service proxy to receive the decertified plan data 3. Integrate the work items with validation and persistant web services	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1525	PM.B.3.Annual Load BHP | Define workflow for BHP Template	As an Exchange Administrator, I want to ensure that the workflow for BHP Template is Defined. 1. Identify the workflow items to be made part of the BPEL workflow process 2. Define a web service proxy to receive the decertified plan data 3. Integrate the work items with validation and persistant web service	NY-HX (CM)/Plan Management
1526	PM.G.3.Initial Load QHP | Receive QHP Plan Data via SERFF	As an Exchange Administrator, I want to ensure that QHP Plan Data is Received. 1. Received QHP Plan data via web service from SERFF 2. BPEL process will pick up the file and send it to Informatica 3. Parse and transform the data into an XML 4. Send the XML to a validation web service to perform data & business validations (Business rules defined by state will be captured in iLog rules engine and will be applied on the fly after the data validations are successful). 5. In case of a failure, the validation process will continue its process on the remaining records, consolidate the other error messages if any and send a notification email to Exchange Regulator with the complete list of error messages. 6. In case of no issues, the XML file is sent to a web service to transform it into POJO objects 7. The data retrieved from the POJO is persisted into the data base using Spring and JPA (Java Persistence API)	NY-HX (CM)/Plan Management
1527	PM.G.3.Initial Load QHP | Define a parser to parse QHP data using Informatica	As an Exchange Administrator, I want to ensure that a parser to parse the QHP data using Informatica is Defined. 1. define a parser that will take an XML file from SERFF and parse it	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1528	PM.G.3.Initial Load QHP | Validate QHP data against the technical and business rules	As the Exchange Administrator, I want ensure that the QHP data is validated against the technical and business rules. 1. define the XSD and the WSDL for the request and the response 2. define the validation error codes and messages 3. generate the web services components for server 4. implement the services to perform the validations	NY-HX (CM)/Plan Management
1531	PM.G.3.Initial Load QHP | Define workflow for QHP Plan Template	As an Exchange Administrator, I want to ensure that the workflow for QHP Plan Template is Defined. 1. Identify the workflow items to be made part of the BPEL workflow process 2. Define a web service proxy to receive the QHP plan data 3. Integrate the work items with validation and persistant web services	NY-HX (CM)/Plan Management
1670	PM.B.1.Annual Load MMC | Complete Medicaid Work if Necessary	As an Exchange Administrator, I want to ensure that Medicaid Work is completed. Finalize the interfaces first. Check with Kalyan - it depends on what work needs to be done in Sprint 7. - NOTE FOR OCT 1 - PENDING OTHER WORK	NY-HX (CM)/Plan Management
1671	PM.G.1.Design PM System | Develop Screens	As an Exchange Administrator, I want to ensure that Screens are Developed.	NY-HX (CM)/Plan Management
1672	PM.G.1.Design PM System | Develop Screens for Exchange Regulator Portal	As an Exchange Regulator, I want a portal to view and validate plan information.	NY-HX (CM)/Plan Management
1674	PM.G.1Design PM System | Enhance Validation Framework to Interface with iLog	As the Exchange Administrator, I want to ensure that the Validation Framework to Interface with iLog is Enhanced.	NY-HX (CM)/Plan Management
1675	PM.G.1.Design PM System | Develop Screens for Issuers	As an Exchange Administrator, I want to ensure that Screens for Issuers are developed.	NY-HX (CM)/Plan Management

RTC ID	Summary	Description	Filed Against
1739	PM.B.1.Annual Load MMC | Medicaid data against the technical and business rules	As an Exchange Administrator, I want to ensure that The Medicaid data being validated against the technical and business rules is completed.	NY-HX (CM)/Plan Management
1809	SEE.E.4.Life Events|cobra rules/Regs	As an Exchange Administrator I need to be able to handle all required rules and regulations that surround COBRA	NY-HX (CM)/SHOP-Broker
1810	SEE.E.4.Life events|Incorporate COBRA	As the Exchange Administrator I need to be able to incorporate COBRA into the employer's benefit selection process.	NY-HX (CM)/SHOP-Broker
1811	SER.E.5.Aggregate Premium|Administer Grace Period - notify employer and insurer	As an Exchange adminstrator I need to have a process in place to notify employers and insurers when the grace period around enrollment begins and ends	NY-HX (CM)/SHOP-Broker
1823	CS.A.1.a.Support Search Select | Basic application information	As a CSR, I want to enter basic applicant information (such as: first name, last name, DOB, SSN, County, Medicaid ID, Account Number, Primary Tax Filer…)	NY-HX (CM)/Customer Service
1824	CS.A.1.a.Support Search Select | Fields required	As a CSR, I want to be prompted for how the combination of fields required to search. (i.e., An indication on the search screen of the combinations of search criteria required to return results.)	NY-HX (CM)/Customer Service
1825	CS.A.1.a.Support Search Select | Display results	As a CSR, I want to display no more than 25 number of results per screen.	NY-HX (CM)/Customer Service
1826	CS.A.1.a.Support Search Select | Receive warning	As a CSR, I want to receive a warning to narrow my search if the search returns more than 500 number of possible matches to alert me to narrow my search criteria.	NY-HX (CM)/Customer Service
1827	CS.A.1.a.Support Search Select | Rank ordered	As a CSR, I want the search results to be rank ordered by the most likely fit to my search criteria to increase the probability that I correctly associate the case.	NY-HX (CM)/Customer Service
1828	CS.A.1.a.Support Search Select | Display additional data	As a CSR I want the search results screen to display additional data elements (see the account number, case residence address, phone number etc…criteria not searched on but displayed) to help me select the right case.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1829	CS.A.1.a.Support Search Select | Preview more account details	As a CSR, I want the ability to preview more account details (such as family members) on an account and drill down without losing my original search results list.	NY-HX (CM)/Customer Service
1830	CS.A.1.a.Support Search Select | Search results	As a CSR, I want the ability to select from the search results the candidate who I have determined to be the customer I am speaking so that I can associate him with the account.	NY-HX (CM)/Customer Service
1831	CS.A.1.a.Support Search Select | Deselect a candidate	As a CSR, I want to be able to deselect a candidate I have determined to be an incorrect match to the account, and return to the original search results list. (Breadcrumb trail)	NY-HX (CM)/Customer Service
1832	CS.A.1.a.Support Search Select | Prepopulated contact information	As a CSR, once I have selected an individual in the system, I want the contact information to be prepopulated into the Maximus CRM.	NY-HX (CM)/Customer Service
1833	CS.A.1.a.Support Search Select | Contact details cleared	As a CSR, once I have deselected an individual in the system, I want the contact details to be cleared from the Maximus CRM.	NY-HX (CM)/Customer Service
1834	CS.A.1.b.Support view results | Editable summary page	As a CSR I want to see an editable summary page which includes: 1. Applicant Name (First, Last) 2. Applicant contact information 3. Plan Enrolled In 4. Other family members associated with case 5. Plans associated with other family members 6. Link or tab to Event history on account by date a. Including the ability to click to view the Contact Record of case/account notes that were created by reps during phone calls or application processing (This is a requirement) b. Including the ability to click to view any documents 7. Primary tax filer on the account 8. Alerts for Fair Hearings / Complaints / Appeals that are currently open or unresolved 9. SPECIAL: Accounts authorized to speak for (If a Navigator/proxy) See Questions	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1835	CS.A.1.b.Support view results | Status of all applictions	As a CSR I want to see on a summary screen, the status of all applications associated with the account by phase. 1. Complete 2. In process 3. Pending missing data: Missing data (from the application) & the ability to satisfy the missing data once correct documentation is submitted. 4. Awaiting verification documents (Documents required such as: ...)	NY-HX (CM)/Customer Service
1836	CS.A.1.b.Support view results | Eligibility results	As a CSR, I want to see on a summary screen, the eligibility results for the individuals associated with the account 1. No subsidy / Full pay 2. APTC eligible 3. BHP eligible 4. Medicaid eligible 5. CHIP eligible 6. Non-MAGI Medicaid eligible 7. Exempt from the mandate 8. Ineligible - Are some people blocked from applying entirely?	NY-HX (CM)/Customer Service
1837	CS.A.1.c.Support make referrals | See plan information	As a CSR, I want see on my summary screen plan information associated with all individuals on the account including: 1. Plan enrolled in 2. Coverage dates 3. Redetermination / open enrollment period 4. Disenrollment reason codes	NY-HX (CM)/Customer Service
1838	CS.A.2.a.Material Req Doc | Type of material requested	As the exchange back office, I need to capture data on the type of material requested, language, media (print, audio, and braille) and the number of items requested so I can fulfil the material request.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1839	CS.A.2.a.Material Req Doc | Enter materials requested	As a CSR, I want to enter materials request information into MAXe including: 1. Name (First, Last) 2. Address 3. Material request type 4. Date requested 5. Contact phone number	NY-HX (CM)/Customer Service
1840	CS.A.2.a.Material Req Doc | Request materials mailed to me	As a user, on the exchange I want a screen (not authenticated) to request materials mailed to me which inlcudes: 1. Name (First, Last) 2. Address 3. Material request type 4. Date requested 5. Contact phone number	NY-HX (CM)/Customer Service
1841	CS.A.2.a.Material Req Doc | File by request type	As the Exchange Back Office, I want to receive a file by request type from the NY HX system which includes: 1. Name (First, Last) 2. Address 3. Material request type 4. Date requested 5. No. of materials so that I can send materials to the customer	NY-HX (CM)/Customer Service
1842	CS.A.6a.IVR Integration | user request printed materials from Exchange	As an authenticated user of the Exchange using IVR, I want to be able to request printed materials without human interaction.	NY-HX (CM)/Customer Service
1843	CS.A.3.Locate Nav/Assist/Prov/Plans | Nnavigator search tool in NY-HX	As a CSR, I want to be able to access a navigator search tool in the NY-HX system displayed through my MAXe/CRM so I can help a customer locate a navigator.	NY-HX (CM)/Customer Service
1844	CS.A.3.Locate Nav/Assist/Prov/Plans | Search proximal to zip code	As a CSR, I want the search function to be proximal to a my zip code.	NY-HX (CM)/Customer Service
1845	CS.A.3.Locate Nav/Assist/Prov/Plans | Search for navigator by name	As a CSR, I want to be able to search for a specific navigator by name.	NY-HX (CM)/Customer Service

RTC User Story Descriptions

RTC ID	Summary	Description	Filed Against
1846	CS.A.3.Locate Nav/Assist/Prov/Plans | Navigator search return	As a CSR, I want to have the navigator search return no more than 10 results at a time.	NY-HX (CM)/Customer Service
1847	CS.A.3.Locate Nav/Assist/Prov/Plans | Search radius by increments	As a CSR, I want to be able to increase the search radius by increments of: 1. 2 miles 2. 5 miles 3. 10 miles 4. more than 10 miles	NY-HX (CM)/Customer Service
1848	CS.A.3.Locate Nav/Assist/Prov/Plans | Provider directory search functions	As a CSR, I want to be able to access the plan and provider directory search funtions of NY-HX that will be displayed on my MAXe/CRM.	NY-HX (CM)/Customer Service
1849	CS.A.3.Locate Nav/Assist/Prov/Plans | Search a specific plan	As a CSR, I want the ability to search on a specific plan.	NY-HX (CM)/Customer Service
1850	CS.A.3.Locate Nav/Assist/Prov/Plans | Search for specific provider	As a CSR, I want the ability to search for a specific provider.	NY-HX (CM)/Customer Service
1851	CS.A.3.Locate Nav/Assist/Prov/Plans | Provider accepting new patients	As a CSR, I want search results returned which indicate if the provider is accepting new patients.	NY-HX (CM)/Customer Service
1852	CS.A.3.Locate Nav/Assist/Prov/Plans | Provider screen results	As a CSR, I want the provider search to return the following data elements: 1. Name 2. Speciality 3. Provider Type 4. Location 5. Directions 6. Distance from customer address entered	NY-HX (CM)/Customer Service

RTC User Story Descriptions

RTC ID	Summary	Description	Filed Against
1853	CS.A.3.Locate Nav/Assist/Prov/Plans | View details of provider	As a CSR, I want to be able to view the details for the provider I select from the search including: 1. Name 2. Address 3. Phone / fax 4. Office hours 5. Participating plans 6. Language spoken 7. Medical School 8. Residency 9. Handicap accessible office space	NY-HX (CM)/Customer Service
1854	CS.A.3.Locate Nav/Assist/Prov/Plans | Customer provider network data	As a CSR, I need to be able to search and display the customer's plan's provider network data results to find a provider convenient to the customer.	NY-HX (CM)/Customer Service
1855	CS.A.3.Locate Nav/Assist/Prov/Plans | Display provider network data results	As a CSR, I need to be able to search and display provider network data results for providers to find which plans the customer's provider participates in.	NY-HX (CM)/Customer Service
1856	CS.B.1.a.Pocess elig screen | CSR eligibility screening using federal mandated questions	As a CSR I want to be able to offer eligiblity screening by asking the federal mandated screening questions.	NY-HX (CM)/Customer Service
1857	CS.B.1.a.Process elig screen | CSR screen display potential eligibility based on screening	As a CSR I want my screen to display potential eligiblity based on screening on coverage and potential cost. (i.e. your child may qualify for coverage at no cost, you may qualify for coverage at low cost)	NY-HX (CM)/Customer Service
1858	CS.A.2.b.Material ID Card | Record request for Medicaid card	As a Customer Service Representative, I need to record a request for a Medicaid card so that the request is documented.	NY-HX (CM)/Customer Service
1859	CS.A.6.a.IVR Integration | Customer needs to authenticate and access Exchange data elements	As a customer using the IVR artifact, I need to be able to authenticate and access data elements from the exchange so that I can use the IVR self-service options.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1860	CS.A.6.b.KMS Integration | CSR view up to date self service artifacts	As a CSR I want to be able to view up to date self-service artifacts in my KMS system within MAXe/CRM including: 1. FAQs by page level 2. On screen help (i.e. what is a benefit level, what is a deductable, why can't I choose the doctor I'd like, why are you asking this question etc.) 3. Standard definitions for terminology used on the exchange	NY-HX (CM)/Customer Service
1861	CS.B.1.b.Process elig determination | CSR perform real-time client identity matching	As a CSR, I need to perform real-time client identity matching by transferring various data elements from the CRM to the HX System and choosing from the received responses or creating a new account when none are returned. --the data I have already entered in the the CRM to be applied to the client matching process -- ability to enter identifying data such as SSN, DOB, Name, Address -- ability to choose from potential matches --ability to enter in additonal information or answers to questions and re-search for new potential matches --ability to create a new account if no appropriate matches are found	NY-HX (CM)/Customer Service
1862	CS.B.1.b.Process elig determination | CSR enter and link household members in same application	As a CSR, I need to enter other household member's information and link these other household members to the same application (they may have different access accounts) to process the application.	NY-HX (CM)/Customer Service
1863	CS.B.1.b.Process elig determination | CSR enter system to assist applicant	As a CSR, I need to be able to enter into the system whether: - a household member is applying for IAP, - applying simply to use the exchange to purchase insurance, or - not applying to use the exchange at all for themselves, but for someone else in the household (like a child or spouse) to process the application.	NY-HX (CM)/Customer Service
1864	CS.B.1.b.Process elig determination | CSR remove members of a policy account	As a CSR, I need to be able to remove members of a policy account, including those just added or those brought over with the client match data to process the application.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1865	CS.B.1.b.Process elig determination | CSR remove member from one case and start another	As a CSR, I need to be able to remove a member from one case and start a new case/application for the member as policy allows to process the application.	NY-HX (CM)/Customer Service
1866	CS.B.1.b.Process elig determination | CSR enter relationship between household members	As a CSR, I need to be able to enter relationships between household members and be told whether their income data is necessary or SSN to process the application. NOTE: The rules engine needs to determine this for us.	NY-HX (CM)/Customer Service
1867	CS.B.1.b.Process elig determination | CSR screen questions to ask needed questions	As a CSR, I need the screen questions to be dynamic based on questions answered, so I only ask the customer the questions needed in his or her situation.	NY-HX (CM)/Customer Service
1868	CS.B.1.b.Process elig determination | CSR resume previously saved application when client match results	As a CSR, I need to resume a previously saved application (started via web, mail/fax, or prior call) when client match results show an application already in process to continue to process the application.	NY-HX (CM)/Customer Service
1869	CS.B.1.b.Process elig determination | CSR Federal income verification results	As a CSR, I need to see the Federal income verification results while processing the application so that I can confirm the information with the customer and discuss State wage information if needed	NY-HX (CM)/Customer Service
1870	CS.B.1.b.Process elig determination | CSR State income verification results	As a CSR, I need to see the the State income verification results while processing the application so that I can confirm the information with the customer	NY-HX (CM)/Customer Service
1871	CS.B.1.b.Process elig determination | CSR client attests income	As a CSR, I need to ask the client to attest to income if the customer does not agree with the results from either the Federal and State hubs.	NY-HX (CM)/Customer Service
1872	CS.B.1.b.Process elig determination | CSR citizenship or incarceration prevents enrollment	As a CSR, I need to see if a citizenship or incarceration result prevents enrollment, so that I can confirm the information with the customer.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1873	CS.B.1.b.Process elig determination | CSR run additional verification of citizenship, incarceration, income	As a CSR, I need to run additional verifications of citizenship, incarceration, and income on all household members added to the application as required to process the application. - See the verification results while processing the application so that I can confirm the information - See if a citizenship or incarceration result prevents enrollment	NY-HX (CM)/Customer Service
1874	CS.B.1.b.Process elig determination | CSR enter attested citizenship when verification process does not produce required data	As a CSR, I need to be able to enter in attested citizenship/immigration information, including A numbers, DEC, and DOS numbers, when the verification process does not produce the required data to process the application.	NY-HX (CM)/Customer Service
1875	CS.B.1.b.Process elig determination | CSR enter attested citizenship	As a CSR, I need to be able to enter in attested citizenship/immigration information, including A number, DEC, and DOS numbers, that does not match the verification results to process the application.	NY-HX (CM)/Customer Service
1876	CS.B.1.b.Process elig determination | CSR system display customer requires documentation for attested info	As a CSR, I need the system to display to me that the customer will be required to submit verification documentation for any attested information so I can discuss this with the customer.	NY-HX (CM)/Customer Service
1877	CS.C.2.Proc Missing Info verif doc | CSR extend due dae for returning documents	As a CSR, I need the ability to extend the due date for a customer for returning verification documents.	NY-HX (CM)/Customer Service
1878	CS.B.1.b.Process elig determination | CSR needs prompts for additional applicant information	As a CSR, I need to be prompted what additional informaton is required to enter in the application, and have a place to enter this information, to process IAP eligibility.	NY-HX (CM)/Customer Service
1879	CS.B.1.b.Process elig determination | CSR enter applicant disability information	As a CSR, I need to be able to enter in disability/blindness information and determine if any applicant is a potential Non-MAGI Medicaid application to process the application.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1880	CS.B.1.b.Process elig determination | CSR enters applicant wishes to be evaluated for non-MAGI Medicaid	As a CSR, I need to be able to enter in whether or not the applicant wishes to be evaluated for Non-MAGI Medicaid, but also continue to screen them under MAGI rules for MAGI Medicaid and ATC assistance to process the application: --to enter in the disability information -- to enter in the customers choice for Non-MAGI referrals --see that the applicant information will be transferred to DOH as applicable to explain to caller	NY-HX (CM)/Customer Service
1881	CS.B.1.b.Process elig determination | CSR sees an applicant eligibility results	As a CSR, I need to see the applicant's eligibility results to be able to explain them to the caller.	NY-HX (CM)/Customer Service
1882	CS.B.1.b.Process elig determination | CSR see notices being sent to applicant	As a CSR, I need to see what notices will be sent to the applicant so that I can inform them what to expect.	NY-HX (CM)/Customer Service
1883	CS.B.1.b.Process elig determination | CSR enter caller preferred method of contact	As a CSR, I need to be able to enter the callers preferred method of contact and appropriate contact information (mail, email, text - whatever NY decides is available) to process the application.	NY-HX (CM)/Customer Service
1884	CS.B.1.b.Process elig determination | CSR enter additional mailing address for applicant	As a CSR, I need to be able to enter and store an additional mailing address if the applicant wants notices sent to a different address than the residence address to process the application.	NY-HX (CM)/Customer Service
1885	CS.B.1.b.Process elig determination | CSR enter and store address for child away at school	As a CSR, I need to be able to enter and store a residence address for a child away at school so that the customer can enroll the child in a plan that serves their school address.	NY-HX (CM)/Customer Service
1886	CS.B.1.b.Process elig determination | CSR indicate verbal agreement for application	As a CSR, I need to be able to indicate in the system verbal aggreement with terms and conditions of the application to process the application.	NY-HX (CM)/Customer Service
1887	CS.B.1.b.Process elig determination | CSR save telephone application	As a CSR, I need to be able to save a telephone application in process so that the applicant can resume it later online, by telephone, or by navigator.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1888	CS.B.1.b.Process elig determination | CSR transfer call to ES for complex customers	As a CSR, I need to transfer the call to an eligibility specialist when a customer's request to apply over the telephone leads to complexities I cannot support to troubleshoot processing the application.	NY-HX (CM)/Customer Service
1889	CS.B.1.b.Process elig determination | CSR system generate temporary login and password for customer	As a CSR, I need the system to generate and display a temporary login account and temporary password for the customer, so the customer or proxy can go on-line to complete the application and enrollment or for any other reason to process the application.	NY-HX (CM)/Customer Service
1890	CS.B.1.b.Process elig determination | Customer needs login and password notice	As a customer who has had a login account created for me by the system, I need the first system notice generated regarding this application to include my login account name and temporary password so I can login to my account later.	NY-HX (CM)/Customer Service
1891	CS.B.1.b.Process elig determination | CSR system sets application source	As a CSR, I need the system to set the source of the application (phone), so that the system can apply conditional rules to support efficient data entry of a phone application.	NY-HX (CM)/Customer Service
1892	CS.B.1.b.Process elig determination | Non-primary tax payer income	As an Eligibility Specialist, I need to receive and document disclosure for non primary Tax Payer so that the household income is verified.	NY-HX (CM)/Customer Service
1893	CS.B.1.b.Process elig determination | Identity proofing	As a Customer Service Representative, I need to view the questions and answers that the customer provided for identity proofing when the account was created so that I can authenticate the caller.	NY-HX (CM)/Customer Service
1894	CS.B.1.b.Process elig determination | CSR perform HIPP calculation	As a CSR, I want the ability to do the HIPP calculation for individuals with access to or covered by the third party insurance.	NY-HX (CM)/Customer Service
1895	CS.B.1.b.Process elig determination | CSR customer check box for medical bills	As a CSR, I need the ability to check a box indicating that the customer has medical bills within the past 3 months.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1896	CS.B.1.b.Process elig determination | ES application data entry task	As an Eligibility Specialist, I need an application data entry task I claim to automatically provide me with the image of the application form (and any other documents attached to the form), so I may process the application.	NY-HX (CM)/Customer Service
1897	CS.B.1.b.Process elig determination | Data entry specialist enter household member info	As an Data Entry Specialist (DE), I need to enter other household member's information and link these other household members to the same application (they may have different access accounts) to process the application.	NY-HX (CM)/Customer Service
1898	CS.B.1.b.Process elig determination | ES enter household info for applicant	As an Eligibility Specialist, I need to: - be able to enter into the system whether a household member is applying for IAP, - applying simply to use the exchange to purchase insurance, or - not applying to use the exchange at all for themselves, but for someone else in the household (like a child or spouse), - or to leave this information blank if not provided, to process the application.	NY-HX (CM)/Customer Service
1899	CS.B.1.b.Process elig determination | ES remove remembers from case included just added	As an ES, I need to be able to remove members of a case, including those just added or those brought over with the client match data to process the application.	NY-HX (CM)/Customer Service
1900	CS.B.1.b.Process elig determination | ES remove member from case and start new case	As an ES, I need to be able to remove a member from one case and start a new case/application for the member as policy allows to process the application.	NY-HX (CM)/Customer Service
1901	CS.B.1.b.Process elig determination | ES enter relationship of household members	As an ES, I need to be able to enter relationships between household members to process the application.	NY-HX (CM)/Customer Service
1902	CS.B.1.b.Process elig determination | ES resume previously saved application	As an ES, I need to resume a previously saved application (from the web or telephone) when client match results show an application already in process to continue processing the application.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1903	CS.B.1.b.Process elig determination | ES enter attested information	As a ES, I need to be able to enter in attested information from the application so that I can process the application.	NY-HX (CM)/Customer Service
1904	CS.B.1.b.Process elig determination | ES save application as invalid	As a ES, I need to be able to save an application as "invalid" if not enough information is available to match the application to an individual and there is no contact information provided so that I can continue processing the application.	NY-HX (CM)/Customer Service
1905	CS.B.1.b.Process elig determination | ES need field for additional info	As a ES, I need a place to enter any additional information provided on the application that may not have a pre-defined field so that I can process the application.	NY-HX (CM)/Customer Service
1906	CS.B.1.b.Process elig determination | ES enter applicant preferred method of contact	As a ES, I need to be able to enter the applicant's preferred method of contact and contact information: mail, email, text, if they provided it so that I can process the application.	NY-HX (CM)/Customer Service
1907	CS.B.1.b.Process elig determination | ES additional mailing address for applicant	As a ES, I need to be able to enter an additional mailing address if the applicant wants notices sent to a different address than the residence address so that I can process the application.	NY-HX (CM)/Customer Service
1908	CS.B.1.b.Process elig determination | ES verify application signature	As a ES, I need to be able to indicate whether or not the application was signed so that I can process the application.	NY-HX (CM)/Customer Service
1909	CS.B.1.b.Process elig determination | ES enter every application	As a ES, I need to be able to enter every application field a customer has completed, even if the rules say some of the information is not needed so I can be efficient in my data entry.	NY-HX (CM)/Customer Service
1910	CS.B.1.b.Process elig determination | ES save application if mandatory fields are missing	As a ES, I need to be able to save the application even if mandatory fields are missing, so that the system can send a notice requesting the missing mandatory data items.	NY-HX (CM)/Customer Service
1911	CS.B.1.b.Process elig determination | ES system sets source of application	As a ES, I need the system to set the source of the application (paper) based on my user login, so that the system can apply conditional rules to support efficient data entry of a paper application.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1912	CS.B.1.b.Process elig determination | Customer needs username and password notification	As a customer who has had a login account created for me by the eligibility specialist, I need the first system notice generated regarding this application to include my login account name and temporary password so I can login to my account later.	NY-HX (CM)/Customer Service
1913	CS.B.1.b.Process elig determination | ES customer medical bills 3 month check box	As an ES, I need the ability to check a box indicating that the customer has medical bills within the past 3 months.	NY-HX (CM)/Customer Service
1915	CS.B.5.Process Exempt | DE or CSR indicate exemption request	As a DE or CSR, I need to be able to indicate if someone in a household is requesting an exemption while others are applying and then the system can initiate an exemption request so that I can process the application.	NY-HX (CM)/Customer Service
1916	CS.A.1.d.Support Navigator authorized | CSR verify proxy via phone	As a CSR, I need to be able to look up my caller to find out if they are a certified proxy, and to find out if they are associated with another account they can apply for so that I only divulge account information to those authorized on an account.	NY-HX (CM)/Customer Service
1917	CS.F.1.ACD Navigators/Assistors | CSR connect proxy to account	As a CSR, I need to be able to associate a proxy to an account.	NY-HX (CM)/Customer Service
1918	CS.F.1.ACD Navigators/Assistors | CSR enter proxy contact information	As a CSR, I need to be able to enter the name, address, and contact information for an proxy (who is not a navigator).	NY-HX (CM)/Customer Service
1919	CS.F.1.ACD Navigators/Assistors | CSR register proxy verbal approval	As a CSR, I need to be able to to register a verbal approval and signature of the person authorizing the proxy (navigator or third party proxy).	NY-HX (CM)/Customer Service
1920	CS.F.1.ACD Navigators/Assistors | ES register proxy from paper form	As an ES, I need to be able to register a proxy from an application form and create an account for that proxy the identity, contact information, signature, and date of signature of someone applying for someone else, or to link the application (with the approved information) to a known navigator.	NY-HX (CM)/Customer Service
1921	CS.B.2.a.Process enroll memb req | CSR system determines client eligible for change or open enrollment	As a CSR, I need the system to be able to determine whether the client is eligible for a change or initial enrollment (which includes verifying that it is under open enrollment, or special enrollment (see rules for special enrollment)).	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1922	CS.B.2.a.Process enroll memb req | CSR HX display client plan options	As a CSR, I need the system to display the options for the new health plans that the client is eligible to enroll in.	NY-HX (CM)/Customer Service
1923	CS.B.2.a.Process enroll memb req | CSR select and confirm plan selection	As a CSR, I need to be able to select and confirm selection of a plan and I need this to trigger notifications to both the client and the health plan of the change.	NY-HX (CM)/Customer Service
1924	CS.B.2.b.Process enroll auth rep | CSR prcoess proxy customer enrollment via phone	As a CSR, I want to process customer enrollment selections submitted by an proxyresentative or other appropriate assistor received via phone.	NY-HX (CM)/Customer Service
1925	CS.A.4.Co-Browsing and Chat | Customer initiating co-browsing	As a customer, I need a way of initiating co-browsing from within the portal.	NY-HX (CM)/Customer Service
1926	CS.A.4.Co-Browsing and Chat | Accepting a customer's request for co-browsing	As a CSR, I will need a way of accepting when a customer is requesting a co-browsing session from within MAXe	NY-HX (CM)/Customer Service
1927	CS.A.4.Co-Browsing and Chat | Prevent making changes to customer's application	As a CSR, I will need to be prevented by the portal from making changes to the customer's application through cobrowsing and will use cobrowsing only to direct clients.	NY-HX (CM)/Customer Service
1928	CS.B.2.a.Process enroll memb req | ES determine if client is eligible for change or initial enrollment	As a ES, I need the system to be able to determine whether the client is eligible for a change or initial enrollment (which includes verifying that it is under open enrollment, or special enrollment (see rules for special enrollment)).	NY-HX (CM)/Customer Service
1930	CS.B.2.a.Process enroll memb req | ES confirm selection of plan and send notices to client and health plan	As a ES, I need to be able to select and confirm selection of a plan and I need this to trigger notifications to both the client and the health plan of the change or initial enrollment.	NY-HX (CM)/Customer Service
1931	CS.B.2.b.Process enroll auth rep req | Data clerk process proxy enrollment received mail or fax	As a data clerk, I want to process customer enrollment selections submitted by an proxyresentative or other appropriate assistor received via mail or fax.	NY-HX (CM)/Customer Service
1932	CS.B.2.a.Process enroll memb | CSR or ES determine client is in open enrollment	As a CSR/ES, I need the system to determine whether the client is in open enrollment period depending on the dates of the annual open enrollment period or the Medicaid renewal period so I can follow the rules accordingly.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1933	CS.B.2.c.Process enroll exceptions/overrides | CSR/ES select special circumstances to override open enrollment rules	As a CSR/ES, I need the ability to select a special circumstances reason to override the open enrollment rules (establish special enrollment).	NY-HX (CM)/Customer Service
1934	CS.C.3.a.Resend missing data | ES notified that missing data notice sent to applicant	As an ES, I would like to know a missing data notice was sent to an applicant who had to stop during the application process. - Is this addressed else where? MAXIMUS TASK - This box needs more Maximus attention to identify where the user story actually belongs. NOTE: The ability to reprint a missing data notice so that I can process the missing data when it comes in. - User Story - Where?	NY-HX (CM)/Customer Service
1935	CS.A.1.b.Support view results | Missing data and verification documents	As an ES, or a CSR, I would like to be able to see a list of all the missing data and verification documents that the applicant will need to complete the application at a later date. ES/CSR list of missing data applicant needs to submit later	NY-HX (CM)/Customer Service
1936	CS.C.1.a.Proc Missing data phone | CSR/ES enters missing data from client via phone	As a CSR, or an ES, I want to be able to enter into the application the missing data the client provides over the phone.	NY-HX (CM)/Customer Service
1937	CS.C.1.a.Proc Missing data phone | CSR/ES system resolves missing data	As a CSR, or an ES, I want the system to recognize and resolve any outstanding missing data item that has been filled in to the application; including a resolution date with a history of when the missing data got resolved.	NY-HX (CM)/Customer Service
1938	CS.C.1.b.Proc Missing data mail | data entry clerk classify docs with no barcode	As a data entry clerk, I need to classify a document with no barcode received as providing missing data for an application in order to route a task to the right person. (Technical Detail: Manual linking)	NY-HX (CM)/Customer Service
1939	CS.C.1.b.Proc Missing data mail | NY-HX system recognize bar code	As the NY-HX system, I need to recognize a bar code and link the documents in an envelope to the associated account automatically.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1940	CS.C.2.Proc Missing Info verif doc | ES see missing verification docs	As an ES, I'd like to see a list of all of the missing verification documents the applicant needs to prove their attestation.	NY-HX (CM)/Customer Service
1941	CS.C.2.Proc Missing Info verif doc | ES choose type of immigration doc	As a ES, I need to be able to choose the type of immigration/citzenship document from a (drop-down) list of potential documents.	NY-HX (CM)/Customer Service
1942	CS.C.2.Proc Missing Info verif doc | ES escalate data entry documentation task	As a ES, I need to be able to escalate the data entry documentation task if the immigration/citizenship document is unfamilar to me and I cannot classify it or I need to confirm the document is not valid for purposes of clarification.	NY-HX (CM)/Customer Service
1943	CS.C.2.Proc Missing Info verif doc | ES enter or correct critical immigration data	As a ES, I need to be able to enter or correct any critical information from the immigration / citizenship document into the HX System.	NY-HX (CM)/Customer Service
1944	CS.C.2.Proc Missing Info verif doc | ES alerted if info does not match	As an ES, I need: -- to be alerted if the information does not match (For instance, immigration/citizenship document does not match the information provided by the applicant.)	NY-HX (CM)/Customer Service
1945	CS.C.2.Proc Missing Info verif doc | ES type of income drop down box	As a ES, I need to be able to choose the type of income document from a (drop-down) list of potential documents. NOTE: Entering information in NY-HX system (CSC Screen)	NY-HX (CM)/Customer Service
1946	CS.C.2.Proc Missing Info verif doc | ES drop down list of income frequency	As a ES, I need to be able to choose the type of frequency of income from a (drop-down) list of potential frequencies.	NY-HX (CM)/Customer Service
1947	CS.C.2.Proc Missing Info verif doc | ES disallow invalied income documents	As a ES, I need to be able to disallow invalid income documents that do not match the Identity of the person the income was requested for. (Name is different)	NY-HX (CM)/Customer Service
1948	CS.C.2.Proc Missing Info verif doc | ES enter different income	As an ES, I need to be able to enter a different income amount than was previously attested or verified and let the system decide if this satisfies the requirement or if it changes eligibility.	NY-HX (CM)/Customer Service
1949	CS.C.2.Proc Missing Info verif doc | ESmark verification doc submitted	As an ES, I need to be able to mark that the verification documentation submitted is not enough to meet the documentation needs, but still save the information entered.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1950	CS.C.2.Proc Missing Info verif doc | ES enter additional info notes, explanation	As an ES, I need to be able to enter additional information, such as notes, as explanation for odd documentation.	NY-HX (CM)/Customer Service
1951	CS.B.3.a.Process disenroll vol req | Client disenroll by portal, phone, paper	As the client, I need to be able to disenroll on the portal, by phone, and paper.	NY-HX (CM)/Customer Service
1952	CS.B.3a.Process disenroll vol req | CSR verify client disenrollment via phone request	As a CSR processing a phone request for disenrollment I need the NY HX rules engine to verify whether the client can disenroll from the plan (not enrolled, locked in, MMC) so I can tell the client whether they are eligible for disenrollment or not.	NY-HX (CM)/Customer Service
1953	CS.B.3.a.Process disenroll vol req| CSR process disenrollment	As a CSR, I need to process the disenrollment in the NY HX system so that the system can notify effective parties EFT: •Health Plan •DHHS	NY-HX (CM)/Customer Service
1954	CS.B.3.a.Process disenroll vol req | CSR HX system notifies customer of disenrollment	As a CSR, I want the NY HX system to notify the customer of their disenrollment via their preferred method of communication and/or written correspondence if required by the State.	NY-HX (CM)/Customer Service
1955	CS.B.3.a.Process disenroll vol req | ES view image of mail or fax submissions	As an ES, I need to be able to view the image submitted via mail or fax.	NY-HX (CM)/Customer Service
1956	CS.B.3.a.Process disenroll vol req | ES verify client is currently enrolled	As an ES, I need to be able to verify that the client is currently enrolled and use the back office screen to enter a voluntary disenrollment request.	NY-HX (CM)/Customer Service
1957	CS.B.3.a.Process disenroll vol req | ES disenrollment notifications to individual, health plan, DHHS	As an ES, I need the disenrollment to trigger notifications to the individual, to the health plan, and to DHHS.	NY-HX (CM)/Customer Service
1958	CS.B.3.a.Process disenroll vol req | CSR/ES dropdown of authorized special circumstances	As a CSR / ES, I need to select from a dropdown list of authorized special circumstances reasons to override enrollment rules.	NY-HX (CM)/Customer Service
1959	CS.B.3.a.Process disenroll vol req | CSR view individual status affecgted by plan change	As a CSR we want the capability to view the individual status effected by the plan change. We would see disenrollment and reason for disenrollment.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1960	CS.B.1.c.Process elig life change events | CSR enter demographic changes	As a CSR, I want to be able to enter demographic changes	NY-HX (CM)/Customer Service
1961	CS.B.1.c.Process elig life change events | CSR enter contact info changes	As a CSR, I want to be able to enter contact information changes	NY-HX (CM)/Customer Service
1962	CS.B.1.c.Process elig life change events | CSR enter income changes	As a CSR, I want to be able to enter income changes	NY-HX (CM)/Customer Service
1963	CS.B.1.c.Process elig life change events | CSR enter family composition changes	As a CSR, I want to be able to enter family composition changes	NY-HX (CM)/Customer Service
1964	CS.B.1.c.Process elig life change events | CSR HX determine redetermiation of eligibility	As a CSR, I need NY-HX to determine whether changes require a re-determination of eligibility and display results.	NY-HX (CM)/Customer Service
1965	CS.B.1.c.Process elig life change events | CSR HX notify client of different eligibility	As a CSR, I need NY-HX to notify a client if eligibility is different (TBD if status is same, do we notify client of change processed?).	NY-HX (CM)/Customer Service
1966	CS.B.1.c.Process elig life change events | data entry clerk document to verify OCR data entry	As a data entry clerk, I need the document displayed so I can do verification and correction of the ICR/OCR in high speed data entry.	NY-HX (CM)/Customer Service
1967	CS.B.1.c.Process elig life change events | ES task for re-determination of eligibility	As an ES, I need the ability to receive a task to enter changes into an application in NY-HX and for the system to determine whether changes require a re-determination of eligibility.	NY-HX (CM)/Customer Service
1968	CS.B.1.c.Process elig life change events | ES needs HX to notify eligibility is different	As an ES, I need NY-HX to notify a client if eligibility is different.	NY-HX (CM)/Customer Service
1969	CS.B.1.c.Process elig life change events | ES update citizenship info	As an ES, I need to be able to update citizenship or immigration changes.	NY-HX (CM)/Customer Service
1970	CS.B.1.c.Process elig life change events | CSR view changes by date, time, user	As a CSR, I need to be able to see what changes have been made to an account via the portal by date, time, and user and the result of the change.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1971	CS.B.1.c.Process elig life change events | CSR view account changes via auto-verification	As a CSR, I need to be able to see what changes have been made to an account via the auto-verification process by date, and time and the result of the change.	NY-HX (CM)/Customer Service
1972	CS.E.1.a.Process Complaints | CSR complaint data fields	As a CSR, I will need data fields for entering a complaint into NY-HX.	NY-HX (CM)/Customer Service
1973	CS.E.1.a.Process Complaints | CSR escalate	As a CSR, I will need be able to escalate to the appropriate party (Supervisor/ DOH).	NY-HX (CM)/Customer Service
1974	CS.E.1.a.Process Complaints | data entry clerk complaint fields	As a data entry clerk, I will need data fields for entering a complaint into MAXe .	NY-HX (CM)/Customer Service
1975	CS.E.1.a.Process Complaints | data entry clerk escalate	As a data entry clerk, I will need be able to escalate to the appropriate party (Supervisor/ DOH).	NY-HX (CM)/Customer Service
1976	CS.E.1.a.Process Complaints | ES needs HX to trigger task creation	As an eligibility specialist, I need the NY-HX portal to trigger task creation for processing complaints on MAXe	NY-HX (CM)/Customer Service
1977	CS.E.1.a.Process Complaints| ES escalate complaints	As a eligibility specialist, working on complaint received throught the NY-HX, I need the ability to escalate to the appropriate parties (Supervisor/ DOH).	NY-HX (CM)/Customer Service
1978	CS.D.1.Validate rec image data | data entry clerk OCR data capture	As a data entry clerk, I want OCR to capture data from document to minimize manual data entry.	NY-HX (CM)/Customer Service
1979	CS.D.1.Validate rec image data | data entry clerk validate OCR capture	As a data entry clerk, I need the ability to validate and correct what OCR captured. (High speed data entry)	NY-HX (CM)/Customer Service
1980	CS.D.1.Validate rec image data | data entry clerk confirm docs sent to Filenet	As a data entry clerk, upon completion of data entry I need to be able to confirm that documents and their metadata have been sent to Filenet.	NY-HX (CM)/Customer Service
1981	CS.D.1.Validate rec image data | HX metadata sent to FileNet	As the Exchange, any uploaded document metadata needs to be sent to FileNet and the DCN needs to be created.	NY-HX (CM)/Customer Service
1982	CS.D.2.Link doc | ES search NY-HX for account, person, applications	As the eligibility specialist, I need to be able to search NY-HX for an account, person, applications that match or potentially match the information on my document.	NY-HX (CM)/Customer Service
1983	CS.D.2.Link doc | ES search display additional info	As an eligibility specialist, I need the system to display additional information about the matches returned that will help me choose the proper match.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1984	CS.D.2.Link doc | ES view document for linking	As an eligibility specialist, I need to be able to view the document I am linking to help me choose the proper match.	NY-HX (CM)/Customer Service
1985	CS.D.2.Link doc | ES link docs and create account	As an eligibility specialist, I need the ability to link a document to the appropriate account or person in NY-HX and/or create an account.	NY-HX (CM)/Customer Service
1986	CS.D.3.Send data to HX | ES OCR capture re-populate fields	As an eligibility specialist, I want the OCR capture to pre-populate appropriate data fields in the NY-HX to minimize manual data entry.	NY-HX (CM)/Customer Service
1987	CS.D.3.Send data to HX | ES interface NY-HX to update customer account	As an eligibility specialist, I need a user interface and data-entry screens directly into NY-HX to update the customer account.	NY-HX (CM)/Customer Service
1988	CS.D.3.Send data to HX | ES needs system to send change notification to client	As an eligibility specialist, I need NY-HX to send a notification to the client when the change requires a notification.	NY-HX (CM)/Customer Service
1989	CS.D.3.Send data to HX | ES re-link document and metadata to account	As an eligibility specialist I need the ability to re-link the document and associated metadata to the correct account if they have been mis-linked.	NY-HX (CM)/Customer Service
1990	CS.D.3.Send data to HX | ES un-link data elements from incorrect account	As an eligibility specialist I need the ability to un-link data elements from a document from the incorrect account if they have been mis-linked so that the document is linked to the correct account.	NY-HX (CM)/Customer Service
1991	CS.D.4.a.Rec support doc | CSR/data entry/ES link supporting docs to account	As a CSR, data entry clerk or eligibility specialist, I need the ability to link all supporting documents to the appropriate account.	NY-HX (CM)/Customer Service
1992	CS.D.4.a.Rec support doc | ES trick docs to move from account to account	As an Eligibility Specialist, I want to be able to "trick" (technical term) the documents so that the documents can move from one account to another in the event that another account is created due to a change in family composition or family/individual eligibility.	NY-HX (CM)/Customer Service
1993	CS.D.4.a.Rec support doc | ES docs linked on HX task	As an eligibility specialist, I want a task created alerting me that documents were linked to the Exchange account.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
1994	CS.D.4.b.Rec online inq email | CSR/data entry/ES handle email inquiries	As a CSR, data entry clerk, or eligibility specialist, I need a mechanism to handle inquiries (aside from complaints) that come in as email. NOTE: The user story matches the Epic for now pending policy questions regarding receiving emails.The thought was that an auto-reply would advise clients to log in to the Exchange.	NY-HX (CM)/Customer Service
1995	CS.D.4.c.Rec outbound dialer | IVR Admin obtain list of phone numbers	As an IVR administrator, I need to be able to obtain a list of phone numbers dependent on a number of configurable parameters from NY-HX through a file exchange.	NY-HX (CM)/Customer Service
1996	CS.D.4.c.Rec outbound dialer | IVR administrator outbound dialer from Maximus to NY-HX	As an IVR administrator, I need to be able to pass and process an outbound dialer response file from Maximus to the NY-HX system.	NY-HX (CM)/Customer Service
1997	CS.D.4.c.Rec outbound dialer | IVR administrator Do Not Call file to Maximus	As an IVR administrator, I would not want "Do Not Call" & previously bad numbers included on the file sent from the NY-HX to Maximus.	NY-HX (CM)/Customer Service
1998	CS.D.1.Validate rec image data | ES search Filenet	As the eligibility specialist, I need to be able to search Filenet for documents through my worker screen (by name, ssn, cid, or etc.) so that I can conduct any necessary research.	NY-HX (CM)/Customer Service
1999	CS.E.2.Process elig appeal | ES enter eligibility appeal	As an eligibility specialist, I need a worker screen with data fields in NY-HX to enter an eligibility appeal.	NY-HX (CM)/Customer Service
2000	CS.E.2.Process elig appeal | ES task creation to process appeals	As an eligibility specialist, I need the NY-HX portal to trigger task creation for processing appeals on MAXe.	NY-HX (CM)/Customer Service
2001	CS.E.3.Process small employer | ES register employer minimum values appeal	As an eligibility specialist, I need a worker screen with data fields in NY-HX to register a small employer minimum values appeal.	NY-HX (CM)/Customer Service
2002	CS.E.4.a.Agency conf establish | ES print aggregate docs	As an eligibility specialist I need the NY-HX system to have the ability to aggregate all documents (inbound & outbound) case notes, event history, contact history & so on and print these out on command.	NY-HX (CM)/Customer Service
2003	CS.E.4.b.Agency conf route tasks | ES escalate issue	As an eligibility specialist, I will need be able to escalate to the appropriate party.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
2004	CS.B.4.a.Process renew auto accept | HX Stakeholder access auto-renewal status	As a HX stakeholder (CSR, ES, DE, Health Plan, Auth Rep, Customer, Navigator), I need to be able to see that an auto-renewal took place through logging in to the web portal (or CSR/ES interface).	NY-HX (CM)/Customer Service
2005	CS.B.4.a.Process renew auto accept | Customer auto-renewal notice	As a Customer, I need to receive a notice of the auto-renewal, including the information used to renew me.	NY-HX (CM)/Customer Service
2006	CS.B.4.a.Process renew auto accept | CSR access auto-renewal data	As an CSR, I need to see the data (from the federal hub, etc.) used to process an auto-renewal if the customer calls to ask about this information or make changes.	NY-HX (CM)/Customer Service
2007	CS.B.4.b.Process renew auto reject | Customer change auto renewal info	As a Customer, I need the opportunity to change my information used for the auto-renewal through all channels, including: - Be able to call and submit new income information - Be able to add or remove someone from my case, as allowed - Request a different plan than the one re-enrolled automatically.	NY-HX (CM)/Customer Service
2008	CS.B.4.b.Process renew auto reject | CSR/customer make changes in auto renewal	As an CSR or Customer, I need to be able to make changes to auto-renewal information and re-run the renewal based on this new data.	NY-HX (CM)/Customer Service
2009	CS.B.4.b.Process renew auto reject | HX takeholder see auto-renewal failure	As a HX stakeholder (CSR, ES, DE, Health Plan, Auth Rep, Customer, Navigator), I need to see that an auto-renewal failed when I log in to the web portal.	NY-HX (CM)/Customer Service
2010	CS.B.4.b.Process renew auto reject | NY-HX administrator no data in auto renewal process	As a NY-HX Administrator, I need to be able to invoke a process in an event that no data is available in auto renewal.	NY-HX (CM)/Customer Service
2011	CS.B.4.b.Process renew auto reject | Customer auto-renewal failed notification	As a Customer, I need to be informed that my auto-renewal failed and information is needed.	NY-HX (CM)/Customer Service
2012	CS.B.4.b.Process renew auto reject | ES/customer submit new info for failed auto-renewal	As an ES or Customer, I need to be able to submit new information for a failed auto-renewal and still have it processed as a renewal.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
2013	CS.B.4.c.Process renew pre-pop Medicaid | Customer needs pre-populated Medicaid renewal application	As a Customer, I need to receive a pre-populated renewal application and/or link to renewal online.	NY-HX (CM)/Customer Service
2014	CS.B.4.c.Process renew pre-pop Medicaid | ES access pre-populated renewal application data	As an ES, I need to have the data from the pre-populated renewal application populated to my application screen to complete a telephone renewal.	NY-HX (CM)/Customer Service
2015	CS.F.1.ACD Navigators/Assistors | CSR update customer record and audit trail	As a CSR, after each add, change or delete I perform, I want the NY-HX system to update the customer record and maintain an audit trail of each action, to support future inquiries and audits.	NY-HX (CM)/Customer Service
2016	CS.F.2.Edit assistor expiration data | CSR modify expiration date on proxy account	As a CSR I want to modify the expiration date of the authorization of a proxy on a customer account to support a customer request.	NY-HX (CM)/Customer Service
2017	CS.F.3.Modify assistor level of access | CSR change customer service proxy access	As a CSR, I want to change the level of proxy access to a customer account to support the customer	NY-HX (CM)/Customer Service
2018	CS.A.1.d.Support Navigator authorized | Access to specific account	As a CSR, I want a screen in NY-HX that includes all users that have access to a specific account and displays the type of access.	NY-HX (CM)/Customer Service
2019	CS.A.1.d.Support Navigator authorized | Accounts that proxy has access to	As a CSR, I want to look up a proxy in NY-HX and see which accounts that proxy has access to.	NY-HX (CM)/Customer Service
2020	CS.A.5.a.Help Desk initiate ticket | CSR submit help desk ticket	As a CSR, I want a screen in the back office NY-HX that will allow me to submit a ticket to the Helpdesk with all necessary information.	NY-HX (CM)/Customer Service
2021	CS.A.5.a.Help Desk initiate ticket | CSR initiate help desk ticket status	As a CSR, I need the same NY-HX back office summary screen that, once the Helpdesk ticket is submitted, I can see the status of the request at the individual account level or search by individual's name or by ticket number.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
2022	CS.A.4.Co-Browsing and Chat | Navigate portal in Help session	As a CSR, I need to be able to help someone navigate the portal in a Help session. (Refer to C2 for more detail).	NY-HX (CM)/Customer Service
2023	CS.A.6.b.KMS Integration | CSR access common connectivity issue info	As a CSR, I want to know what the most common issues are with connectivity/use of the web portal and I want this information accessible in my CRM. (Fast alert to a known problem).	NY-HX (CM)/Customer Service
2024	CS.A.5.b.Help Desk process req | CSR web search for customer account	As a CSR, I need a way of identifying the account user name by searching other criteria to help a caller access the web portal.	NY-HX (CM)/Customer Service
2025	CS.A.4.Co-Browsing and Chat | Queue of web chat requests	As a CSR, I need a way of viewing a queue of web chat requests, a method of selecting a chat, and a way of typing and responding to the client.	NY-HX (CM)/Customer Service
2026	CS.A.4.Co-Browsing and Chat | Chat sessions integrated in CRM tool	As a CSR, I need a web chat session to be integrated into my CRM tool.	NY-HX (CM)/Customer Service
2027	CS.A.5.c.Help Desk acct lock out | CSR unlock customer when locked out of account	As a CSR, I need functionality in my back office screen to unlock a user in case they have tried multiple times.	NY-HX (CM)/Customer Service
2028	CS.A.5.d.Help Desk password reset | CSR ability to reset passwords	As a CSR, I need functionality in my back office screen to reset passwords so that the user can get access to the exchange.	NY-HX (CM)/Customer Service
2029	CS.A.5.d.Help Desk password reset | CSR reset customer password	As a CSR, I need the functionality when resetting the password that the account will also be unlocked.	NY-HX (CM)/Customer Service
2030	CS.A.5.d.Help Desk password reset | CSR notify NY-HX of customer password change	As a CSR, if I reset the password on a customer's account, I want the NY-HX to notify the customer of the change and ask the customer to contact the exchange if they were not the one to put a request for change.	NY-HX (CM)/Customer Service
2031	CS.B.1.d.Process elig Non-MAGI | Eligibility specialist non-MAGI applicants	As an Eligibility Specialist, I want to be able to refer known non-MAGI applicants who applied via mail/fax for a full Medicaid application.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
2032	CS.B.1.d.Process elig Non- MAGI | CSR screen out non-MAGI individual	As a CSR, I need the functionality that is built in the NY-HX system to screen out a recognized a non-MAGI Medicaid individual from the application process.	NY-HX (CM)/Customer Service
2033	CS.B.1.d.Process elig Non-MAGI | Eligibility Specialist non-MAGI applicants	As an Eligibility Specialist, I want to be able to refer known non-MAGI applicants who applied via mail/fax for a full Medicaid application.	NY-HX (CM)/Customer Service
2034	CS.B.5.Process Exempt | NY-HX Admin exemption info to DOH	As an NY-HX Administator I want to be able to route exemption requests received to DOH staff.	NY-HX (CM)/Customer Service
2035	CS.B.5.Process Exempt | CSR back office capture exemption	As a CSR, through my back office screen, I need the ability to capture an exemption request and link it to an existing account or create a new account.	NY-HX (CM)/Customer Service
2036	CS.B.5.Process Exempt | data entry capture exemption	As a data entry clerk, I need a functionality to capture an exemption request and link it to an existing account or create a new account.	NY-HX (CM)/Customer Service
2037	CS.G.1.a.Self help static | customer static and search function	As a customer, I want to be able to stay on the application page that I am on and have access to a Google-type search function for further information on questions I might have	NY-HX (CM)/Customer Service
2038	CS.G.1.a.Self help static | customer help static info	As a customer, I want a header for each section of the application that will have a "tell me more" component that will tell me what information is necessary to complete this section As a customer I want roll-over-pop-up boxes that explain more information about each component of the website with a link to even more information	NY-HX (CM)/Customer Service
2039	CS.G.1.b.Self help FAQ | customer FAQ page	As a customer, I want a FAQ page that is accessible throughout the application process	NY-HX (CM)/Customer Service
2040	CS.G.1.c.Self help search | customer search by location	As a customer, I want a search-by-location and distance of a database of current qualified navigators and a map of these navigators. I want this to display the phone number, location, and name of navigators - As a customer, I want this function to be accessible on every page of the application	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
2041	CS.G.1.c.Self help search | customer search function	As a customer, I want a Google-type search function that lets me search by a variety of components for a plan - I want to be able to compare the plans by a variety of functions (cost, benefits)	NY-HX (CM)/Customer Service
2042	CS.G.1.c.Self help search| Language Accessibility	As a Customer, with limited English skills, I want to search for information in my native language so that I can understand the ACA and the eligibility process.	NY-HX (CM)/Customer Service
2043	CS.A.4.Co-Browsing and Chat | Click to chat on every page	As a customer, I want the ability to click to chat visible on every page of the application, and visible on all screens of the portal. - I want this function to disappear when the call center is not operating. (during business hours only)	NY-HX (CM)/Customer Service
2044	CS.A.4.Co-Browsing and Chat | Cobrowsing during business hours	As a customer, I need a way to initiate cobrowsing during business hours ONLY and need the function to be turned off after business hours.	NY-HX (CM)/Customer Service
2045	CS.A.4.Co-Browsing and Chat | Customer initiate co-browsing	As a customer, I need a way to initiate cobrowsing during business hours ONLY and need the function to be turned off after business hours.	NY-HX (CM)/Customer Service
2046	CS.G.2.Access self manage | customer update info	As a customer, I want - the ability to reset my password - the ability to change contact info - the ability to add/delete/update account information	NY-HX (CM)/Customer Service
2047	CS.G.3.Capture form of complaint | Capture complaint, appeal, grievance	As a customer, I want a screen to enter complaint, appeal, or grievance. - I want NYHX to prompt me on whether I want to log in or register a complaint anonymously - I want NYHX to know whether I am able to register this type of appeal or grievance online and if not prompt me to appropriate venue (phone or in paper)	NY-HX (CM)/Customer Service
2048	CS.B.2.d.Process enroll manage open enrollment | Requesting dis-enrollment	As a CSR/ES, I need to process an application to accommodatea customer who is requesting to be dis-enrolledfrom one health plan and re-enrolled into another.	NY-HX (CM)/Customer Service

RTC ID	Summary	Description	Filed Against
2049	CS.C.3b.Resend missing | missing notice sent	As an ES, I would like to know a missing info notice was sent to an applicant who had to stop during the application process.	NY-HX (CM)/Customer Service
2087	SEE.A.1.Employee Register|Cross check with individual	As the Exchange, I want to cross check the Individual and Employee tables to determine if the Employee currently exists.	NY-HX (CM)/SHOP-Broker
2088	SEE.A.1.Employee Register|Employee homepage	As an Employee, I want an individual homepage to view my current benefits and Exchange transactions.	NY-HX (CM)/SHOP-Broker
2089	SEE.A.1.Employee Register|Facilitate account registration	As an Employee, I want the Exchange to facilitate my account registration.	NY-HX (CM)/SHOP-Broker
2090	SEE.A.2.Employee Register|Notify employee no longer eligible	As an Employee, I want to be notified when I am no longer eligible for my Employer's coverage so I can select a new plan.	NY-HX (CM)/SHOP-Broker
2091	SEE.A.2.Employee Register|Employee opt out option	As an Employee, I want the option to opt out of Employer-sponsored insurance.	NY-HX (CM)/SHOP-Broker
2092	SEE.C.3.EE Quoting/Select QHP|Print reports for clients	As a Producer, I need the ability to print individualized plan option pages and enrollment materials for participating employees who may not be computer literate or have access to a computer.	NY-HX (CM)/SHOP-Broker
2093	SEE.C.3.EE Quoting/Select QHP|Pediatric dental plan	As an Employee I want to be able to select a standalone pediatric dental and/or vision plan	NY-HX (CM)/SHOP-Broker
2094	SEE.C.2.EE Quoting/Select QHP|Provider directory	As an Employee, I want to view a provider directory on the Exchange so I can view the plans my Provider participates in.	NY-HX (CM)/SHOP-Broker
2095	SEE.D.1.EE Plan Enrollment|Calculate employee participation	As the Exchange Admin, I will calculate the rate of Employee participation based on participation, not plans.	NY-HX (CM)/SHOP-Broker
2096	SEE.D.3.EE Plan Enrollment|Notify employer of employee's selection	As an Employer, I want to be notified of the Employee's selection regardless of whether or not the Employee chooses to opt out.	NY-HX (CM)/SHOP-Broker
2097	SER.C.6.ER Quoting / Select QHP|Pediatric dental	As an Employer, I want to select a standalone pediatric dental and/or vision plan.	NY-HX (CM)/SHOP-Broker
2098	SER.D.1.Employee Roster|View only minimum employee data	As the Employer, I see only minimal, necessary Employee data to comply with HIPAA Privacy and Security standards.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
2099	SER.E.2.Aggregate Premium|Monthly aggregation premium bills	As the Exchange Admin, I want to generate monthly aggregation premium bills for SHOP Employers.	NY-HX (CM)/SHOP-Broker
2100	FM .Aggregate Premium | Report out monthly employer cost	As the Exchange Admin, I want to provide each participating business with an aggregated monthly bill for the total cost of Employee's coverage, specifying the Employer's and Employee's shares.	NY-HX (CM)/Financial Management
2101	SER.G.7.Monitor EE Enrollment & Reconcile Actual|Notify QHP employee no longer eligible	As the Exchange Admin, I want to send a notification to the Carrier when an Employee is no longer employed, so that coverage can be terminated.	NY-HX (CM)/SHOP-Broker
2102	SER.G.7.Monitor EE Enrollment & Reconcile Actual|Effective date of termination	As an Employer, I want to define the effective date of termination of coverage for employees.	NY-HX (CM)/SHOP-Broker
2103	SER.G.7.Monitor EE Enrollment & Reconcile Actual|Date of hire versus date of coverage|Distinguish between hire and effective dates	As an Exchange Admin, I want to distinguish between date of hire and effective date of coverage.	NY-HX (CM)/SHOP-Broker
2104	SER.I.5.Brokers/Agents|Employer contribution as a monthly amount	As a Producer, I want to present the Employer contribution as a monthly amount.	NY-HX (CM)/SHOP-Broker
2105	SER.I.1.Brokers/Agents|Deactivate producer	As an Exchange Admin, I want to deactivate a Producer.	NY-HX (CM)/SHOP-Broker
2106	SER.I.4.Brokers/Agents|Producer homepage	As a Producer, I want an Exchange Home page to manage my account.	NY-HX (CM)/SHOP-Broker
2107	SER.I.5.Brokers/Agents|Verify producer	As an Exchange Admin, I want to verify the Producer has been authorized to purchase insurance on behalf of the Employer.	NY-HX (CM)/SHOP-Broker
2108	SER.I.5.Brokers/Agents|Producer as employer	As a Producer, I want to perform tasks similar to what an employer can do.	NY-HX (CM)/SHOP-Broker
2109	SER.I.5.Brokers/Agents|Producer sort/file plans	As a Producer, I want to sort/filter plans by multiple criteria to refine the number of viable plans.	NY-HX (CM)/SHOP-Broker
2110	SER.I.5.Brokers/Agents|Producer download to Excel	As a Producer, I need the ability to download to an Excel spreadsheet.	NY-HX (CM)/SHOP-Broker
2111	SER.I.5.Brokers/Agents|Broker assisted enrollment audit functionality	As the Exchange Admin, I want to provide Broker-assisted enrollment audit functionality that performs SHOP functions on behalf of an Employer.	NY-HX (CM)/SHOP-Broker

RTC User Story Descriptions

RTC ID	Summary	Description	Filed Against
2112	SER.I.5.Brokers/Agents|Record producer id and credentials	As the Exchange Admin, I will record Producer identification and credentials if the Employer interacts with a Producer on the Exchange.	NY-HX (CM)/SHOP-Broker
2113	SER.I.7.Brokers/Agents|Revoke consent	As an Employee, I want the ablility to revoke consent for a Producer to view my data and/or purchase a plan on my behalf.	NY-HX (CM)/SHOP-Broker
2114	SER.I.7.Brokers/Agents|View minimum employee data	As a Producer, I see only minimal, necessary Employee data to comply with HIPAA Privacy and Security standards.	NY-HX (CM)/SHOP-Broker
2115	PM.G.1.Design PM System | Employer termination	As the Exchange Admin, I want to notify the QHP when an Employer terminates coverage.	NY-HX (CM)/Plan Management
2116	PM.G.1.Design PM System | Notify Issuers of an applicant QHP	As the Exchange Admin, I want to notify Issuers of an applicant's QHP	NY-HX (CM)/Plan Management
2117	PM.G.1.Design PM System | Transmit enrollment and eligibility information to the QHP Issuer	As the Exchange, I want to transmit enrollment and eligibility information to the QHP Issuer on a timely basis.	NY-HX (CM)/Plan Management
2118	PM.G.1.Design PM System | Receive acknowledgement from QHP	As the Exchange Admin, I want to receive QHP Issuer acknowledgement of receipt of enrollments from the Exchange.	NY-HX (CM)/Plan Management
2119	PM.G.1.Design PM System | Receive acknowledgement from Issuer	As the Exchange Admin, I want to receive an acknowledgement of enrollment information from the Issuer.	NY-HX (CM)/Plan Management
2120	SER.G.3.Monitor and Reconcile EE Enrollment|Transmit to TPA	As an Exchange Admin, I want to transmit enrollment and eligibility changes to a TPA system if the TPA is performing back office functions for the Employer.	NY-HX (CM)/SHOP-Broker
2121	SEE.B.2.Eligibility/Subsidy Determintation|Track employee waivers	As the Exchange Admin, I want to produce reports to track Employee waivers.	NY-HX (CM)/Individual
2122	SEE.B.2.Eligibility/Subsidy Determintation|Broadcast effective date of QHP	As the Exchange, I want to provide Enrollees with the effective date for the QHP.	NY-HX (CM)/Individual
2123	SER.H.1.Employer Enrollment|Annual election period notice	As an Employee, I want to receive notification when the annual election period is approaching.	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
2124	OVR.C.2.Reporting | Notify IRS	As an Exchange Admin, I want to notify the IRS and/or other relevant departments of Employer participation in SHOP.	NY-HX (CM)/Oversight and General
2125	OVR.C.2.Reporting | Statutory reporting	As an Exchange Admin, I want to provide Statutory Reporting.	NY-HX (CM)/Oversight and General
2126	OVR.C.3.Reporting | Maintain enrollment records	As the Exchange Admin, I want to maintain records of all enrollments in QHPs through the Exchange.	NY-HX (CM)/Oversight and General
2127	SER.Z.2.Reporting | Enrollment trend reports	As an Exchange Admin, I want to generate data and reports on enrollment trends.	NY-HX (CM)/Oversight and General
2128	OVR.C.3.Reporting | Successful enrollment reports	As an Exchange Admin, I want to generate data and reports on the number of successful enrollments in Health Plans.	NY-HX (CM)/Oversight and General
2129	SER.Z.2.Reporting | Demographic reports	As an Exchange Admin, I want to generate data and reports on displaying the number of enrolled users based on different demographic variables.	NY-HX (CM)/Oversight and General
2130	OVR.C.3.Reporting | Management reporting	As an Exchange Admin, I want to provide Management Reporting.	NY-HX (CM)/Oversight and General
2131	OVR.C.3.Reporting | Stakeholder reporting	As an Exchange Admin, I want to provide Stakeholder Reporting.	NY-HX (CM)/Oversight and General
2132	SER.G.6.Monitor and Reconcile EE Enrollment|Notify employers of employee choices	As an Exchange Admin, I want to send a notice to employers or designees of employee selections.	NY-HX (CM)/Individual
2133	SER.G.6.Monitor and Reconcile EE Enrollment|Employer eligibility determinations	As the Exchange Admin, I will provide notification of Employer eligibility determinations.	NY-HX (CM)/Individual
2134	SER.H.1.Employer Enrollment|Receive annual election period notification	As an Employer, I want to receive notification when the annual election period is approaching.	NY-HX (CM)/SHOP-Broker
2151	OVR.C.2.Capture Data Required by Feds l Capture Reporting Data For Federal Submission	As the exchange, create reports fulfilling required data from Federal Government.	NY-HX (CM)/Oversight and General
2176	SEE.A.3.Employee Register|Employer versus Individual coverage	As an employee I want to know if it is more beneficial to enroll in health benefits through my employer or through the individual exchange.	NY-HX (CM)/SHOP-Broker
2177	SEE.A.4.Employee Register|Process non-eligible employee	As the Exchange I want to stop an employee from registering for employer sponsored coverage if they are not eligible	NY-HX (CM)/SHOP-Broker

RTC ID	Summary	Description	Filed Against
2178	SEE.B.1.Eligibility/Subsidy Determination|Employee affordability determination	As an employee I want to determine if I am eligible for my employer sponsored coverage or individual coverage.	NY-HX (CM)/SHOP-Broker
2179	SEE.B.3.Eligibility/Subsidy Determination|American Indian eligibility	As an employee I want to see what my eligibility requirements are through the Exchange if I am an American Indian	NY-HX (CM)/SHOP-Broker
2188	SER.E.3.Aggregate Premium|FM integration	As the Exchange Administrator I need to have a process in place to integrate financial data collected in the SHOP with the preferred accounting system so that all stakeholders get paid.	NY-HX (CM)/SHOP-Broker
2202	SEE.C.1.EE Quoting/Select QHP|View cost on website	As an employee, I would like to view on the website what my costs are to buy insurance through my employer sponsored plan so that I can make an informed decision when choosing a health plan	NY-HX (CM)/SHOP-Broker
2204	SEE.C.4.EE Quoting/Select QHP|Check out after selecting plan	As an employee, I would like to be able to check out after selecting my plan so that I can continue on with my SHOP experience Acceptance Criteria: Comments:	NY-HX (CM)/SHOP-Broker
2206	SEE.D.2.EE Plan Enrollment|employee premium	As the Exchange I want to calculate the premium payment for the employee so the employee knows what his/her cost will be for their employer sponsored health insurance.	NY-HX (CM)/SHOP-Broker
2207	SEE.E.2.Life Events|employee change plan	As an employee I want it to be possible to change my plan selection in the Exchange in relation to life events so that I can properly cover myself and my dependents.	NY-HX (CM)/SHOP-Broker
2211	OVR.C.4.Publication of Costs | Data Collect	As the Exchange administrator I want to publish, accessible to consumers on the NY-HX website, financial information regarding required licensing fees, regulatory fees and payments and the administrative costs of such an Exchange. Included in this informational posting shall also be information on monies lost to waste, fraud and abuse. Collect data from applicable Tracks to populate web page	NY-HX (CM)/Oversight and General

RTC ID	Summary	Description	Filed Against
2212	SEE.E.3.Life Events|employee life events	As an employee I want the ability to add a dependent, delete a dependent etc. during the year through the Exchange so that I can keep my health insurance coverage current	NY-HX (CM)/SHOP-Broker
2225	SEE.F.3.Re-Enrollment|Disenroll employee	As an Exchange Administrator I need to have a process in place to disenroll an employee for whatever reason so that I can keep the employer roster current.	NY-HX (CM)/SHOP-Broker
2273	SER.B.5.Employer Register|Exception processing	As an Exchnage Operator, I need to develop policy regrading Exception Processing re: Employer Register	NY-HX (CM)/SHOP-Broker
2305	SER.C.4.ER Quoting / Select QHP|Estimate employer cost	As an employer I would like to estimate my cost to provide health insurance to my employees through the Exchange	NY-HX (CM)/SHOP-Broker
2307	SER.C.7.ER Quoting / Select QHP|employee guidance	As an Exchange Administrator, I want to provide employees affordability guidance through the employer Quoting / Select QHP module so that they can easily decide on a health plan	NY-HX (CM)/SHOP-Broker
2308	SER.C.8.ER Quoting / Select QHP|check out	As an employer I would like the ability to check out once I have completed my plan selections so I can continue my SHOP experience	NY-HX (CM)/SHOP-Broker
2309	SER.D.2.Employee Roster|COBRA information	As an Exchange Administrator, I want to insure that there is minimal data on the Employee Roster for a COBRA eligibility determination so a COBRA eligible employee can select health insurance	NY-HX (CM)/SHOP-Broker
2310	SER.D.3.Employee Roster|Batch upload	As an Exchnage Administrator, I need to have a process in place that will allow the batch up-loading of the Employee Roster for participating Employers so they don't have to manually enter the data	NY-HX (CM)/SHOP-Broker
2312	SER.E.1.Aggregate Premium|Collect premium payments	As an Exchange administrator I need to arrange to collect premium payments to become the central hub for this financial data	NY-HX (CM)/SHOP-Broker
2314	SER.E.4.Aggregate Premium|Interface with FM	As the Exchange Administrator, I need to coordinate with the financial management system so that all stakeholders can be paid accordingly	NY-HX (CM)/SHOP-Broker
2315	SER.E.6.Aggregate Premium|Broker obligations	As an Exchange Administrator I need to be able to track all financial obligations due to Brokers so that I can report out to Brokers and Insurers which employees are with which Brokers	NY-HX (CM)/SHOP-Broker
2316	SER.G.4.Monitor and reconcile EE Enrollment|ER Tax Credit	As the Exchange Administrator I have to be able to calculate and track an employer's Tax Credit	NY-HX (CM)/SHOP-Broker

RTC User Story Descriptions

RTC ID	Summary	Description	Filed Against
2318	SER.G.8.Monitor and reconcile EE Enrollment|demographic data	As an employer I would like to be able to Change / Delete/ Update my company's demographic data	NY-HX (CM)/SHOP-Broker
2320	SER.G.9.Monitor and reconcile EE Enrollment|change in life events	As the Exchange Administrator I have to be able to handle changes in life circumstances for all enrolled employers and employees	NY-HX (CM)/SHOP-Broker
2321	SER.H.3.Employer Enrollment|Disenroll	As an Exchange Administrator, I need to have a process to disenroll employers on an annual cycle as part of the re-enrollment/open enrollment period	NY-HX (CM)/SHOP-Broker
2322	SER.I.2.Brokers/Agents|training and testing	As a NY-HX Representative, I need to develop a program to train Brokers/Agents on the ACA and NY-HX.	NY-HX (CM)/SHOP-Broker
2323	PM.A.1.Plans Solicitation | User Story Placeholder Work done by DOH	As the CSC development team, I want to support the work that NY State is doing in Plans Solicitation.	NY-HX (CM)/Plan Management
2324	PM.A.2.Support QHP Certification Process | User Story Placeholder Work done by DOH	As the CSC development team, I want to support the work that NY State is doing in QHP Certification Process.	NY-HX (CM)/Plan Management
2325	PM.A.3.Ensure Ongoing QHP Plan Certification | User Story Placeholder Work done by DOH	As the CSC development team, I want to support NY State in the work that they are doing for Ongoing QHP Plan Certification	NY-HX (CM)/Plan Management
2326	SER.G.1.Monitor and Reconcile EE Enrollment|re-estimate employer costs	As an Exchange Administrator I need a process to re-estimate employer costsduring any type of change in employer data so that I reflect the most up to date information	NY-HX (CM)/SHOP-Broker
2327	SEE.D.4.Employee Plan Enrollment|notify insurer	As the Exchange, I want to notify the insurer that the employee has enrolled with their plan so that the insurer can process the employee information and get their coverage started.	NY-HX (CM)/SHOP-Broker