New York Health Benefit Exchange

Blueprint Summary for
9.6 Information Technology System Requirements
October 26, 2012

Item Number	Topic
9.6	**Information Technology System Requirements**

Version Number	Modified By	Revision Date	Description of Change
1.1			Updates as requested by CCIIO from CMS Design Review on 10/9/2012 and 10/10/2012

New York State
Department of Health

New York Health Exchange Project

CSC

Design Review Follow-up

9.6 Information Technology System Requirements

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Customer Service

Identifier	Short Name	Primary Text	Category	Title
8319	CS.E.2b.History	"As an Issuer, I would like the ability to view history of current and prospective members.	Transaction History for Issuer	Health Plan Issuer - 2b History
8318	CS.E.2.Ad Hoc Reports	"As an Issuer, I would like to generate reports of enrollment activities. "	Account Management Ad-Hoc Reports	Health Plan Issuer - 2. Account Management Ad-Hoc Reports
8317	CS.E.1Set Up Issuers	"As NY-HX Representative, I need to accept files from DOH that contain updated Issuers for uploading into the NY-HX system. "	Set Up (ACD) Authorized Issuer	Health Plan Issuers - 1. Set Up (ACD) Authorized Issuer
7226	CS.B.7. Corrections and Overrides	"As a Consumer Assistance Representative, I need to unblock Website access for the User."	7. Corrections and Overrides as applicable	Via NY-HX (Self Service) - 7. Corrections and Overrides as applicable
7225	CS-B.5. Log and Route (for verification)	"N/A"	5. Log and Route (for verification)	Via NY-HX (Self Service) - 5. Log and Route (for verification)
7224	CS.B.4. Issue For Complainant	"As an Enrollee in the NY-HX, I want to file a complaint."	4. Issue For Complainant	Via NY-HX (Self Service) - 4. Issue For Complainant
7223	CS.B.3b.Rules - System Intervention	"As a Applicant, I need to provide documentation so that my application can be processed."	3. b. Rules - System intervention	Via NY-HX (Self Service) - 3. b. Rules - System intervention
7222	CS.B.2. Access Self Management	"As an Applicant, I need to go back to the NY-HX website and finish my application."	2. Access self management (password)	Via NY-HX (Self Service) - 2. Access self management (password)
7216	CS.A 1. Information for Consumers	"As a Consumer, I need to learn more about the ACA."	1. Information for Consumers	Via NY-HX (Self Service) - 1. Information for Consumers
7215	CS.B.3.a User Options	"As an Front End User, I need to mail the documents needed to process my application."	3. a. User Options	Via NY-HX (Self Service) - 3. a. User Options
7211	CS.G.4. Show Individuals in Workflow	"As Consumer Assistance Representative, I want access to information that will allow me to inform Navigators about an Applicant's enrollment status."	4. Show me individuals in their workflow	Navigators & Other 3rd Party Assisters - 4. Show me individuals in their workflow
7210	CS.G.3. Connect a Person	"As a Consumer Assistance Representative, I need access to information about Navigator programs approved by DOH for referral purposes."	3. Connect a person to a Navigator	Navigators & Other 3rd Party Assisters - 3. Connect a person to a Navigator
7209	CS.G.2. Training & Testing	"As a NY-HX Representative, I need to develop a program to train Navigators on the ACA and NY-HX."	2. Training & Testing	Navigators & Other 3rd Party Assisters - 2. Training & Testing
7208	CS.G.1.Add and Update Navigators	"As a NY-HX Administrator, I need to develop an approval process for	1. Add-Change-Delete (ACD)	Navigators & Other 3rd Party

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		Navigators and the ability to channel additions, changes and deletions for system updates."	authorized Navigators	Assisters - 1. Add-Change-Delete (ACD) authorized Navigators
7203	CS.D.3.d.Research	"As a Consumer Assistance Representative, I need to receive program updates from Back-End Users (DOH, DFS, Issuer, etc. for issues that require research and/or program updates."	3. Respond (d.) Research	Level 2 Support (DOH, DFS, Issuer, etc.) - 3. Respond (d.) Research
7196	CS.C.5.Interface with NY-HX	"As a Consumer Service Representative, I need to document responses/resolution/outcomes to inquiries, appeals, complaints in the NY-HX so that the information is available to other Back-End Users."	5. Resolution to NY-HX system as appropriate	Customer Service Center (Level 1) - 5. Resolution to NY-HX system as appropriate
7195	CS.C.4.d.Access Website with User	"As a Consumer Service Representative, I would like to mirror online access with Individuals to assistthem in navigating the NY-HX website."	4. Respond (d.) How do Iï¿½?	Customer Service Center (Level 1) - 4. Respond (d.) How do Iï¿½?
7191	CS.C.3.Confirm Participation	"As a Consumer Assistance Representative, I need to be able to confirm Enrollee participation and history to respond to inquiries."	3. Respond (a.) Request additional information as needed	Customer Service Center (Level 1) - 3. Respond (a.) Request additional information as needed
7213	CS.E.2.b. History	"As a DOH Administrator, I need to generate reports showing enrollment and other activities of Navigators."	6. Capture Navigator activity metrics	Navigators & Other 3rd Party Assisters - 6. Capture Navigator activity metrics
7214	CS.A.2.Fulfillment	As a Consumer Assistance Representative, I would like to send informational packets to all new enrollees.	2. Fulfillment	Operations - 2. Fulfillment
7192	CS.C.4.a.Respond	"As a Consumer Assistance Representative, I would like to update/change log in information so that Individuals can access the NY-HX Website."	4. Respond (a.) (Access management)	Customer Service Center (Level 1) - 4. Respond (a.) (Access management)
7189	CS.C.1.Receive Inquiry	"As a Consumer Assistance Representative, I need to be able to receive telephone calls, faxes, mail, e-Mails and to chat online with Consumers, Applicants, Employers and representatives from other Agencies."	1. Receive issue/Inquiry from Customer Service Center	Customer Service Center (Level 1) - 1. Receive issue/Inquiry from Customer Service Center
7204	CS.E.2.c Transaction Logs	"As a Back-End User, I need to record receipt and research of special requests, and document outcomes to make status available to HY-HX system users, as needed."	4. Record activity	Level 2 Support (DOH, DFS, Issuer, etc.) - 4. Record activity
7221	CS.B.1.Online Chat	"As a Front-End User, I want to chat online with a Consumer Assistance Representative."	1.e. Online Chat	Via NY-HX (Self Service) - 1.e. Online Chat
7190	CS.C.2.Log and Route	"As a Consumer Assistance Representative, I need log and categorize issues so that I can route them for resolution."	1. a (Issue) and 2. Log and Route	Customer Service Center (Level 1) - 1. a (Issue) and 2. Log and Route

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7193	CS.C.4.b.Access Management	"As a Consumer Service Representative, I want to generate and send a letter to request additional information from an Applicant."	4. Respond (b.) Request additional information, as needed	Customer Service Center (Level 1) - 4. Respond (b.) Request additional information, as needed
7194	CS.C.4.c.Access Application	"As a Consumer Service Representative, I want to determine the exact status and history of an Application."	4. Respond (c.) Where is my application?	Customer Service Center (Level 1) - 4. Respond (c.) Where is my application?
7212	CS.G.5.Identity of Person	As a Navigator, I would like to be able to access the NY-HX system using the identify of Applicants who require special assistance.	5. (Streamlined) Access to take on identity of an authorizing person	Navigators & Other 3rd Party Assisters - 5. (Streamlined) Access to take on identity of an authorizing person
7198	CS.D.1.Interface with other Back End Users	"As a Consumer Assistance Representative, I need a process to forward various issues to DOH, DFS, Issuer, etc. for resolution."	1. Receive Issue/Inquiry from Customer	Level 2 Support (DOH, DFS, Issuer, etc.) - 1. Receive Issue/Inquiry from Customer
7200	CS.D.2.Enter Application	"As a Consumer Assistance Representative, I need a process to enter information on to the application from individuals who mailed in their applications."	2. Enter application from mail	Level 2 Support (DOH, DFS, Issuer, etc.) - 2. Enter application from mail
7199	CS.D.2.Enter Application	"As a Consumer Assistance Representative, I need a process to enter information on to the application from Individuals calling the NY-HX."	2. Enter application from phone	Level 2 Support (DOH, DFS, Issuer, etc.) - 2. Enter application from phone
7201	CS.D.3.a. Request Information	"As a Back-End User (DOH, DFS, Issuer, etc.) I need to generate a letter to request additional information/documentation needed to determine eligibility."	3. Respond (a.) Request additional information.	Level 2 Support (DOH, DFS, Issuer, etc.) - 3. Respond (a.) Request additional information.
7205	CS.D.5 Resolution to NY-HX	"As a NY-HX Administrator, I need to design a workflow for system users to route suggestion for systems enhancements, clarification of issues and to authorize program updates and modifications, as appropriate."	5. Resolution to NY-HX system as appropriate	Level 2 Support (DOH, DFS, Issuer, etc.) - 5. Resolution to NY-HX system as appropriate
7206	CS.D.3.b.View Transactions	"As a Back-End User (DOH, DFS, Issuer, etc.) I would like access to the NY-HX website to view transaction of From End Users."	3. Respond (b.) View what Complainant has done on the NY-HX SystemNY-HX System	Level 2 Support (DOH, DFS, Issuer, etc.) - 3. Respond (b.) View what Complainant has done on the NY-HX SystemNY-HX System
7207	CS.E.3.Final Validation of Plan	"As an Issuer, I would like the ability to sign off on the plan information loaded into the NY-HX."	3. Final validation of Plan changes in NY-HX System	Health Plan Issuers - 3. Final validation of Plan changes in NY-HX System

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7202	CS.D.3.c.Special Circumstances	As a Back-End User (DOH, DFS, Issuer, etc.), I need the ability to view to act on request for exceptions, appeals and complaints from Front End Users.	3. Respond (c.) Challenges, special circumstances & Appeals	Level 2 Support (DOH, DFS, Issuer, etc.) - 3. Respond (c.) Challenges, special circumstances & Appeals
8315				New User Story
7197	CS.C.6.Generate Reports	As a Consumer Assistance Manager, I need information of number of calls, online requests, nature of inquiries, follow-up and interventions needed to address issuers/concerns.	6. Manage response process and collect metrics	Customer Service Center (Level 1) - 6. Manage response process and collect metrics
7220	CS.B.1.Help Info	N/A	1.d. Help Buttons Context Sensitive	Via NY-HX (Self Service) - 1.d. Help Buttons Context Sensitive
7217	CS.B.1.Static Content Info	As a Individual, I want to know what information is available on the NY-HX website.	1.a. Static Content	Via NY-HX (Self Service) - 1.a. Static Content
7219	CS.B.1.Search Info	As a Consumer, I would like to search for information on various topics.	1.c. Search	Via NY-HX (Self Service) - 1.c. Search
7218	CS.B.1.FAQ Info	"As a Visitor, I want to find questions and answers about the ACA and NY-HX."	1.b. FQA	Via NY-HX (Self Service) - 1.b. FAQ

1.1.1 Financial Management

Identifier	Short Name	Primary Text	Category	Title
7377	FM.A.1.APTC/CSR-CMS	"As an Exchange Operator, I want to receive APTC (and CSR) Payment reports from Issuer and Match individuals between CMS and Issuer records - exact matches, partial matches, false positives, false negatives."	Receive Data from CMS	APTC/CSR 1b. attribute CMS data to issuer
7376	FM.A.1.APTC/CSR-EE data	"As an Exchange Operator, I want to collect (APTC and CSR) Payment reports from EE to record the payment amounts Â Issuers will receive in order to reconcile these at Issuer level."	Receive Data from CMS	APTC/CSR 1a. reports to CMS issuer pmts
7378	FM.A.3.APTC/CSR-EE APTC	"As an Exchange Operator, I want to report Exchange enrollment data to CMS on a monthly basis. Conversation : The monthly report to CMS 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?"	Report Data to CMS	APTC/CSR 3a. EE APTC data to CMS
7381	FM.A.3.APTC/CSR-EE Income	"As an Exchange Operator, I want to report Exchange enrollment data to CMS on a	Report Data to CMS	APTC/CSR 3d. EE Income data to CMS

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		monthly basis. Conversation: The monthly report to CMS should include 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?"		
7379	FM.A.3.APTC/CSR-EE SLCSP	"As an Exchange Operator, I want to report Exchange enrollment data to CMS on a monthly basis. Conversation: The monthly report to CMS should include 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?"	Report Data to CMS	APTC/CSR 3b. EE SLCSP data to CMS
7380	FM.A.3.APTC/CSR-Fam Sz	"As an Exchange Operator, I want to report Exchange enrollment data to CMS on a monthly basis. Conversation: The monthly report to CMS should include 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?"	Report Data to CMS	APTC/CSR 3c. EE Family Size data to CMS
7384	FM.A.4.APTC/CSR-EE 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."	Reconcile Data	APTC/CSR 4c. Eligibility change from EE data cleanse
7382	FM.A.4.APTC/CSR-HHS	"As an Exchange Operator, 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 CMS."	Reconcile Data	APTC/CSR 4a. APTC from HHS data cleanse
7383	FM.A.4.APTC/CSR-Issuer	"As an Exchange Operator, I want to receive APTC (and CSR) Payment reports from Issuer and perform Data Quality cleansing to support matching. To do this, I will need to get information from QHPs."	Reconcile Data	APTC/CSR 4b. APTC from Issuer data cleanse
7386	FM.B.1. SHOP Prem Billing-ER Roster	"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.	Aggregate Issuer Premium for Employers	SHOP Premium Processing 1a. ER Roster bill

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		Conversation: We need this information for reporting purposes. Comment: Done in SHOP."		
7385	FM.B.1. SHOP Prem Billing-Paid	"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."	Aggregate Billing SHOP	SHOP Premium Processing-1a. Aggregate Pd
7387	FM.B.1. SHOP Prem Billing-Receipts	"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."	Distribute Aggregate Issuer Premium	SHOP Premium Processing-1b. A/R -SHOP receipts- EFT
7388	FM.B.2. Ind Prem Billing to CMS	"As an Exchange Operator, I want to send verified individual premium payment history reports, after receiving these reports from Issuers, to CMS. Conversation: Issuers will need to supply information to the Exchange in order that we may calculate premiums due. Comment; Do we have to be bothered with any individual premium offsets?"	Process Premium data from Individuals	SHOP/Ind Premium Processing 2b. Ind to CMS
7389	FM.B.2. Ind Prem Billing-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."	Receive Individual Data from Issuers	SHOP/Ind Premium Processing 2b. from Issuers
7392	FM.B.3. SHOP Prem Billing-Collections	"As an Exchange Operator, I need to develop a collections strategy to collect full premiums from SHOP employers."	Issuer Pmt Mgmt	SHOP Premium Processing-3bi. A/R - Collections
7391	FM.B.3. SHOP Prem Billing-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."	Resolve Discrepancies in Employer Premiums	SHOP Premium Processing-3b. Aged A/R
7393	FM.B.3. SHOP Prem Billing-Cancel	"As an Exchange operator, I need a mechanism to manage non-payment of SHOP premium so the Exchange can collect or notify Issuer to cancel coverage."	Issuer Pmt Mgmt	SHOP Premium Processing-3bii A/R - Cvg Cancel
7394	FM.B.3. SHOP Prem Billing-Late	"As an Exchange operator, I need a mechanism to manage	Issuer Pmt Mgmt	SHOP Premium

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		payments to Issuers that employers send late."		Processing- 3c A/R - Late Pmts
7390	FM.B.3. SHOP Prem Billing-Reconcile	"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."	Resolve Discrepancies in Employer Premiums	SHOP Premium Processing- 3a. Reconcile, Update
7395	FM.C.1.Core Bus Svce-A/R	"As an Exchange Operator, I need to Record all funds collected and enter them into an accounts receivable ledger."	Issuer Pmt Mgmt	Core Bus Svces/Issuer Pmt Mgmt- 1. A/R Gen'l
7396	FM.C.2.Core Bus Svce-A/P	"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 also need to make transfers on a timely basis."	Accounts Payable	Core Bus Svces/Issuer Pmt Mgmt - 2. A/P -Distribute Monies to Issuers
7397	FM.C.2.Core Bus Svce-Offset	"As an Exchange Operator, I need to offset any premiums sent to Issuers by users fees charged to manage the Exchange."	Accounts Payable	Core Bus Svces/Issuer Pmt Mgmt - 2a. 2b. A/P- Offset Monies Paid by User Fees
7399	FM.C.3.Core Bus Svce-Bank	"As an Exchange Operator, I need to ensure the receipts from SHOP premiums are deposited in the bank (treasury)."	Issuer Pmt Mgmt	Core Bus Svces/Issuer Pmt Mgmt-3b. Cash Mgmt - Bank
7398	FM.C.3.Core Bus Svce-Inv	"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."	Issuer Pmt Mgmt	Core Bus Svces/Issuer Pmt Mgmt- 3a. Cash Mgmt-Investmnt
7400	FM.C.4.Core Bus Svce-Expenses	"As an Exchange Operator, I must have a documented practice for handling general expenses including authorities and permissions."	General Expenses	Core Business Svce- 4a. General Expenses
7402	FM.C.4.Core Bus Svce-FFE	"As an Exchange Operator, I must have a documented practice for furniture fixtures and equipment procurement."	FFE/Purchasing	Core Business Svce- 4c. FFE Purchasing
7401	FM.C.4.Core Bus Svce-HR	"As an Exchange Operator, I must have a documented practice for Human Resources procurement and on boarding."	Human Resources	Core Business Svce- 4b. Human Resources
7403	FM.C.5.Core Bus	"As an Exchange Operator, I	Annual Budget	Core Business

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	Svce-Budget	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."		Svce 5. Annual Budget
7404	FM.C.6.Core Bus Svce-Grants	"As an Exchange Operator, I must ensure that I have system in place to track Navigator (and Others) grants."	Annual Reporting	Core Business Svce - 6. Grants Management
7405	FM.C.7.Core Bus Svce-User Fee	"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."	User Fees	Core Bus Svces/Issuer Pmt Mgmt-User Fee Policy
7407	FM.D.1.Oversight-B/S	"As an Exchange Operator, I must ensure that I have system in place to generate Balance Sheet as required."	Annual Reporting	Oversight -1e. Annual Reporting Balance Sheet
7409	FM.D.1.Oversight-EE/Prem	"As an Exchange Operator, I want to be able to calculate enrollment and premium data to forward to the appropriate state agencies."	Annual Reporting	Oversight 1b. Annual Reporting - Enrollment and Premium Data
7408	FM.D.1.Oversight-I/S	"As an Exchange Operator, I must ensure that I have system in place to generate an Income Statement as required."	Annual Reporting	Oversight -1d. Annual Reporting Income Statement
7406	FM.D.1.Oversight-OSC	"As an Exchange Operator, I need to develop a report that provides details about the flow of funds to the state comptroller's office."	Issuer Pmts	Oversight- 1. Annual reporting to OSC
7411	FM.D.2.Oversight-ER Roster	"As an Exchange Operator, I want to be able to set up a roster of employees for aggregated premium collection to show the Employer Page to Review Employee Roster. Conversation: The roster will list premium in sum total for each Issuer further separated by employer Comment: Do we get this from SHOP?"	Report Issuer Charges	Oversight - 2b. Roster to Employer
7410	FM.D.2.Oversight-premium to CMS	As an Exchange Operator, I need to develop a report that provides details about the premiums written by Issuers to CMS	Report Issuer Pmts	Oversight - 2a. Issuer Premium to CMS
7424	FM.D.3.Oversight-Agg QHP premium	"As an Exchange Operator, I need to record premiums written by NY-HX QHPs to compile data for user fee calculations."	User Fees	Oversight 3. Plan Assessment/User Fees-Aggregate QHP Premium for Fees calc
7423	FM.D.3.Oversight-Aggregate	"As an Exchange Operator, I need to access premiums written by all NYS carriers identified by the DFS for user fee	User Fees	Oversight 3. Plan Assessment/User Fees-

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		calculations."		Aggregate NYS Issuer Premiums from DFS
7425	FM.D.3.Oversight-Bill User Fee	"As an Exchange Operator, I need to develop a billing and collections system for user fees."	User Fees	Oversight 3. Plan Assessment/User Fees-Bill/Collect user fees
7413	FM.D.3.Oversight-Calc User Fee	"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 user fees according to state-determined user fee formula."	Users Fees	Oversight - 3. Plan Assessment/User Fees-Calculate User Fee
7414	FM.D.3.Oversight-Collect User Fee	"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."	Users Fees	Oversight - 3. Plan Assessment/User Fees-Collect User Fee
7364	FM.D.3.Oversight-Fee formula	As an Exchange Operator, I need to calculate User fees using the formula developed by the state regulators	User Fees	Oversight 3. Plan Assessment/User Fees-State Formula User Fees
7426	FM.D.3.Oversight-Fee formula	"As an Exchange Operator, I need to calculate User fees using the formula developed by the state regulators."	User Fees	Oversight 3. Plan Assessment/User Fees-State Formula User Fees
7427	FM.D.3.Oversight-Fee Offset	"As an Exchange Operator, I need to develop a system whereby any user fees charged to QHPs can be deducted from their premiums due."	User Fees	Oversight 3. Plan Assessment/User Fees-User Fee Offset
7422	FM.D.3.Oversight-Fee spread	"Spike: 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."	User Fees	Oversight 3. Plan Assessment/User Fees Mgmt- Fee Spread
7416	FM.D.3.Oversight-Notify User Fee	"As an Exchange Operator, I want to be able to calculate user fee assessments on Issuers if the state elects this option. Conversation: Exchange must be able, with data available, to both calculate user fee and Notify issuers of user fee."	Users Fees	Oversight - 3. Plan Assessment/User Fees-Notify of User Fee
7415	FM.D.3.Oversight-Pay	"As an Exchange Operator, I want to make aggregate	Aggregate Issuer	Oversight - 3. Plan

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		premium payments to Issuers less fees (Coverage Adjustments, APTC, Users fees, if necessary) calculated."	Premium-User Fees	Assessment/User Fees-make pmt less fees
7412	FM.D.3.Oversight-Prem deductions	"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."	Users Fees	Oversight - 3. Plan Assessment/User Fees-Calculate deductions to Issuer premium
7417	FM.D.3.Oversight-Update	"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."	Users Fees	Oversight - 3. Plan Assessment/User Fees-Update Account for User Fee
7419	FM.D.4.Oversight-Audit	"As an Exchange Operator, I must ensure that I am prepared for audit or examination by state and federal authorities."	Reconciliation/Audit	Oversight - 4b. External Audit
7421	FM.D.4.Oversight-Compliance	"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."	Reconciliation/Audit	Oversight - 4. Program Integrity, Compliance
7420	FM.D.4.Oversight-Reconciliaiton	"As an Exchange Operator, I must ensure that the reconciliations done are compiled by the Exchange are available for audit an examination by the (???)."	Reconciliation/Audit	Oversight - 4c. Reconciliation, Audit
7418	FM.D.4.Oversight-Separate duties	"As an Exchange Operator, I must ensure that I have a proper policy/procedure to separate duties to avoid conflicts and remain compliance with ethical and legal standards."	Reconciliation/Audit	Oversight - 4a. Separation of Duties
7432	FM.E.3.Risk Data-design feed	"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)."	Claims/Encounter data	Risk Data 3a. Reinsurance Claims Encounter Data -Design data Feed
7433	FM.E.3.Risk Data-non grandfathered	"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.	Claims/Encounter data	Risk Data 3b. Reinsurance Claims Encounter Data-Non-Grandfathered Plans

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		Comments: will we need to collect this in anticipation of NYS taking over reinsurance plan (ie data review)."		
7369	FM.E.3.Risk Data-summary	"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."	Claims Encounter Data	Risk Data 3. Reinsurance Claims, Encounter Data-Detail Summary
7430	FM.E.4.Risk Data-EE data feed	"As an Exchange Operator, I want to report Exchange enrollee and plan data to a Reinsurance entity, to the state and to CMS to participate in risk spreading programs. Conversation: Create data feed to reinsurance entity/DFS."	Enrollee/Plan data	Risk Data - 4. Reinsurance - Enrollee, Plan Data-create data feed
7429	FM.E.4.Risk Data-EE data send	"As an Exchange Operator, I want to report Exchange enrollee and plan data to a Reinsurance entity, to the state and to CMS to participate in risk spreading programs. Conversation: Send data feed to reinsurance entity/DFS."	Enrollee/Plan data	Risk Data - 4. Reinsurance - Enrollee, Plan Data - Send
7428	FM.E.4.Risk Data-EE design feed	"As an Exchange Operator, I want to report Exchange enrollee and plan data to a Reinsurance entity, to the state and to CMS to participate in risk spreading programs. Conversation: data Design data feed to reinsurance entity/DFS."	Enrollee/Plan data	Risk Data - 4. Enrollee Plan Data-Design data feed
7436	FM.F.2.Risk Mgmt-collect	"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: Use data collected in Risk spreading programs [Story #]to create data design for enrollee/premium data bound for reinsurance entity."	Reinsurance	Risk Mgmt 2. Collect Claims data Risk Calc
7434	FM.F.3.Risk Mgmt-design	"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."	Risk Adj	Risk Mgmt - 3. Risk Adj Data design Enrollee data
7435	FM.F.3.Risk Mgmt-extract	"As an Exchange Operator, I want to extract enrollee data so the state can calculate risk adjustment payments and charges. Conversation: Send	Risk Adj	Risk Mgmt - 3. Risk Adj Data-Enrollee data extract

Identifier	Short Name	Primary Text	Category	Title
		exchange enrollee data for risk adjustment calculation to CMS."		
7437	FM.F.4.Risk Mgmt-send 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: Send data to reinsurance entity reinsurance entity."	Reinsurance	Risk Mgmt 4. Send data to Reinsurer

1.1.2 Individual

Identifier	Short Name	Primary Text	Category	Title
7465	As a Consumer I to be able to tell the exchange about any existing Health insurance I have or my dependents have so the information can be utilized in my eligibility determination.	Eligibility/ Subsidy Determination	Other insurance	
7473	As a Consumer I want any member of a tax household to enroll in the Exchange so long as one of the tax filers for the household meets the residency standard	Eligibility/ Subsidy Determination	Income- tax hh income and applicable MA/CHP hh income elements that may differ (educational grant/loan, certain AI/AL income)	
7475	As a Consumer I want help deriving my income	Eligibility/ Subsidy Determination	Income- tax hh income and applicable MA/CHP hh income elements that may differ (educational grant/loan, certain AI/AL income)	
7464	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	Enrollment	Summary Page	
7462	As a Consumer I want to be able to Identify myself or a family member as Native American/ Alaskan Native	Eligibility/ Subsidy Determination	Household size-tax and MA/CHP household composition	
7459	As a Consumer I want to be able to access the HX in Spanish	Eligibility/ Subsidy Determination	Create account new / existing	
7458	As a Consumer I want to be able to be able to delete all records related to my account prior to a completed eligibility determination	Eligibility/ Subsidy Determination	Create account new / existing	

Identifier	Short Name	Primary Text	Category	Title
7934	As a Consumer I want to be able to correct any information in my application that needs to be done in real time.	Eligibility/ Subsidy Determination	Create account new / existing	
7463	As a Consumer I want to be able to create a user Logon and password	Eligibility/ Subsidy Determination	Create account new / existing	
7469	As a Consumer I want to be able to designate a third party to receive notices	Eligibility/ Subsidy Determination	Third Party	
7468	As a Consumer I want to be able to electronically sign my application so I can complete the application process.	Enrollment	Electronic Signature	
7935	As a Consumer I want to be able to print out a copy of my completed application	Eligibility/ Subsidy Determination	Create account new / existing	
7474	As a Consumer I want to be able to see my individual and Household enrollment history	Enrollment	Summary Page	
7472	As a Consumer I want to be able to tell the exchange I want to be considered for Financial Assistance	Eligibility/ Subsidy Determination	Apply- Determine Eligibility all insurance affordability programs (e.g., Medicaid, CHIP, APTC, BHP, CSR). availability of ESI and current employment	
7461	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	Eligibility/ Subsidy Determination	Create account new / existing	
7471	As a Consumer I want to be able to track the status of my enrollment so I can confirm I have coverage.	Enrollment	Summary Page	
7460	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.	Eligibility/ Subsidy Determination	Summary Page	

Identifier	Short Name	Primary Text	Category	Title
7467	As a Consumer I want to be presented with a page that tells me the status of any documentation I need to provide, what time frames I have to present them and a means to electronically submit documentation or mail them if I do not have an electronic copy documentation . This includes uploading files, scans, faxes, images from cell phones, etc.	Eligibility/ Subsidy Determination	Exceptions	
7466	As a Consumer I want to be presented with a summary of all the information I have entered in the application process so I can review or edit it in order to move forward with the enrollment process.	Eligibility/ Subsidy Determination	Summary Page	
7470	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.	Eligibility/ Subsidy Determination	Apply- Determine Eligibility all insurance affordability programs (e.g., Medicaid, CHIP, APTC, BHP, CSR). availability of ESI and current employment	
7457	As a Consumer, I want to be able to shop for Insurance without having a determination for Financial Assistance done.	Eligibility/ Subsidy Determination	Referral (non-magi)	
7450	As a consumer I want to apply for an Exemption in order to not obtain insurance.	Individual Exemptions	Determine exemption eligibility	
7444	As a consumer I want to designate someone as an Authorized Representative in order to access my user account.	Eligibility/ Subsidy Determination	Right/ Declarations/ Third Parties	
7451	As a consumer I want to renew my Exemption in order to not obtain insurance.	Individual Exemptions	Prepare and update individual exemption	
7443	As a consumer I would like to create a user account in order to purchase insurance through the NY HX.	Eligibility/ Subsidy Determination	Create account new/existing	
7445	As a consumer I would like to	Eligibility/ Subsidy	Apply- Determine	

Identifier	Short Name	Primary Text	Category	Title
	determine eligibility for insurance through the NY HX for myself and/or other members of my household.	Determination	Eligibility all insurance affordability programs (e.g., Medicaid, CHIP, APTC, BHP, CSR). availability of ESI and current employment	
7442	As a consumer I would like to shop anonymously in order to see what my insurance options are though the NY HX.	Anonymous Shopper/General Lookup	Screener Tool	
7447	As a consumer, I would like to disenroll myself and/or members of my household from the current health plan so other options can be explored outside of the NY HX.	Life Events	Change / Delete / Update	
7446	"As a consumer, I would like to enroll myself and/or members of my household into a health plan so I can have health insurance through the NY HX."	Enrollment	Consumer Enrollment	
7448	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.	Re-Enrollment	Connect back to enrollment	
7449	As a consumer, I would like to the ability to appeal decisions made by the exchange to exercise by right as a consumer.	Appeals	Appeal eligibility determination	
7476	As an Exchange I want to Identity Proof all account creators (to be determined if applies to all roles)	Eligibility/ Subsidy Determination	Identity	
7942	As the Exchange I want to be able to capture all the data needed to send to the Federal Government	Eligibility/ Subsidy Determination	Verify	
7479	As the Exchange I want to be able to have multiple clocks running for an account simultaneously so that I can take action upon expiration.	Eligibility/ Subsidy Determination	Apply- Determine Eligibility all insurance affordability programs (e.g., Medicaid, CHIP, APTC, BHP, CSR).	

Identifier	Short Name	Primary Text	Category	Title
			availability of ESI and current employment	
7943	As the Exchange I want to be able to maintain all the data sent to the Federal Government	Eligibility/ Subsidy Determination	Verify	
7477	As the Exchange I want to be able to share functionality between Individual E & E and SHOP	Eligibility/ Subsidy Determination	Create account new / existing	
7478	As the Exchange I want to gather all the information needed to make sure a consumer is eligible to purchase coverage on the Exchange	Eligibility/ Subsidy Determination	Apply- Determine Eligibility all insurance affordability programs (e.g., Medicaid, CHIP, APTC, BHP, CSR). availability of ESI and current employment	
7948	As the Exchange I want to provide information in simple and understandable terms	Eligibility/ Subsidy Determination	Consent / Privacy	
7930	As the Exchange, I need 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.	Eligibility/ Subsidy Determination	Create account new / existing	
7931	As the Exchange, I need provide access to the NY HX via multiple browsers inclusive of (Safari, Goggle Chrome etc&#65533;) so a user can navigate the NY HX.	Eligibility/ Subsidy Determination	Create account new / existing	
7928	As the Exchange, I need to establish auditing of data, updates and other changes in order meet requirements.	Eligibility/ Subsidy Determination	Create account new / existing	
7453	As the Exchange, I need to establish user roles and role based security in order to comply with HIPAA, NIST and FIPS security standards.	Eligibility/ Subsidy Determination	Create account new / existing	
7932	As the Exchange, I need to provide a homepage that is intuitive and gives the user the ability to identify the type of user	Eligibility/ Subsidy Determination	Create account new / existing	

Identifier	Short Name	Primary Text	Category	Title
	they are (i.e. Individual, employee, employer ,broker and assistor) so the user can navigate based on user type.			
7929	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	Eligibility/ Subsidy Determination	Create account new / existing	
7933	As the Exchange, I need to provide persistent features that offers the user the ability to navigate to multiple user "help" functions inclusive of accessibility to a site map, table of contents, glossary of terms, chat capabilities, ability to change font sizes, keyword searches, printable, downloadable documents and notifications.	Eligibility/ Subsidy Determination	Create account new / existing	
7452	As the Exchange, I need to provide user account management inclusive of establishing a user account, returning user log-ins, updating profile, password updates/changes, and account lock out.	Life Events	Change / Delete / Update - user account	
7454	As the Exchange, I need to support multiple languages in order to meet requirements.	Eligibility/ Subsidy Determination	Create account new / existing	
7944	As the Exchange, I want the ability to send reporting data to the Federal Government	Eligibility/ Subsidy Determination	Verify	
7938	As the Exchange, I want the system to , track and log all access to the website	Eligibility/ Subsidy Determination	Create account new / existing	
7939	As the Exchange, I want the system to track and log all modifications made to records in the exchange	Eligibility/ Subsidy Determination	Create account new / existing	
7937	As the Exchange, I want the web site to comply with all Federal and State Required Security requirements	Eligibility/ Subsidy Determination	Create account new / existing	

Identifier	Short Name	Primary Text	Category	Title
7936	As the Exchange, I want the web site to comply with all Federal and State Required accessibility requirements	Eligibility/ Subsidy Determination	Create account new / existing	
7947	As the Exchange, I want to I want to be have existing Medicaid and CHP member information pre-loaded into the system	Eligibility/ Subsidy Determination	Create account new / existing	
7940	As the Exchange, I want to be able to ping multiple sources for data , store the results and using predefined rules determine which source to use	Eligibility/ Subsidy Determination	Verify	
7946	As the Exchange, I want to notify the MMIS of Medicaid and CHP eligibility determinations	Eligibility/ Subsidy Determination	Apply- Determine Eligibility all insurance affordability programs (e.g., Medicaid, CHIP, APTC, BHP, CSR). availability of ESI and current employment	
7945	As the Exchange, I want to send Tax Credit HH/FPL% and CSR information to the Federal Government	Eligibility/ Subsidy Determination	Apply- Determine Eligibility all insurance affordability programs (e.g., Medicaid, CHIP, APTC, BHP, CSR). availability of ESI and current employment	
7941	As the Exchange, I want to store previous copies of each account record	Eligibility/ Subsidy Determination	Create account new / existing	
7927	As the Exchange, I would like to conduct periodic enrollment reporting and reconciliation	Eligibility/ Subsidy Determination	Prepare and update individual exemption application	
7456	As the exchange I want to provide the user the opportunity to correct any information that is negated by a hub or other source in order to allow them to continue in the process.	Eligibility/ Subsidy Determination	Exceptions	
7455	As the exchange I want to provide the user the opportunity	Appeals	Reflect Appeal Decision in Web	

Identifier	Short Name	Primary Text	Category	Title
	to dispute any information that is negated by a hub or other sources in order to allow them to continue in the process.		Site	
8313	" As the NY HX, I need to provide notices to all users via multiple means including, electronic and paper in order to meet requirements."		Access/Next Steps/Notice	

1.1.3 Oversight

Identifier	Short Name	Primary Text	Category	Title
8288	O.A.1.Multiple Browsers	As a NY-HX user I want to access via: IE 8 or 9, Firefox x or x, Chrome y or y, and Safari	Usability	OVR.A.1.Oversight Browser Access
8289	O.A.2.Multiple Languages	As a NY-HX user I want the option to select multiple languages	Usability	OVR.A.2.Multiple Languages
8290	O.A.3. Static Information	As the NY-HX user I want to view all pages of static information on the NY-HX	Usability	OVR.A.3. Static Information
8291	O.A.4.Download Documents	As a NY-HX user I want to download documents	Usability	OVR.A.4.Download Documents
8292	O.A.5.Up-Load Documents	As a NY-HX user I want to up-load documents to NY-HX	Usability	OVR.A.5.Up-Load Documents
8293	O.B.1.Consumer Create Account	As a consumer I want to create an account Username/PW	User Access Management	OVR.B.1.Comsumer Create Account
8302	O.B.10.Navigator Manage Role	As the NY-HX Navigator agency I want to manage role based access for users	User Access Management	OVR.B.10.Navigator Manage Role
8294	O.B.10.Restrict Data Element Access	As an NY-HX Administrator I want to restrict access for other users to the data element level	User Access Management	OVR.B.10.Restrict Data Element Access
8295	O.B.2.Sys Admin Account	As an NY-HX Systems	User Access Management	OVR.B.2.Sys Admin Account

Identifier	Short Name	Primary Text	Category	Title
		Administrator I want to create accounts Username/PW for back-office users		
8296	O.B.3.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	User Access Management	OVR.B.3.Batch Creation
8297	O.B.4.Deactivate User	As an NY-HX Systems Administrator I want to deactivate users	User Access Management	OVR.B.4.Deactivate User
8298	O.B.5.Re-Activate User	As an NY-HX Systems Administrator I want to re-activate users	User Access Management	OVR.B.5.Re-Activate User
8299	O.B.6.Role Based Access	As an NY-HX Systems Administrator I want to manage role-based access for users	User Access Management	OVR.B.6.Role Based Access
8300	O.B.7.CSR Manage Role	As the NY-HX customer service representative agency I want to manage role based access for users	User Access Management	OVR.B.7.CSR Manage Role
8301	O.B.9.Restrict Table Access	As an NY-HX Administrator I want to restrict access for other users to the table level	User Access Management	OVR.B.9.Restrict Table Access
8303	O.C.1.Ad Hoc reporting	As an NY-HX Administrator I need to produce ad-hoc inquiry reports about NY HX user activity	Reporting	OVR.C.1.Oversight Ad Hoc reporting
8304	O.C.2. User created report	As an NY-HX Administrator I need to produce a report that will run periodically for external	Reporting	OVR.C.2.Oversight User created report

Identifier	Short Name	Primary Text	Category	Title
		submissions		
8305	O.C.3.Management Reports	As an Exchange manager, I need reports to monitor and manage	Reporting	OVR.C.3.Management Reports
8306	O.D.1.Generic Template	As an NY-HX Administrator I want to develop a Generic Template for Notices	Notices	OVR.D.1.Generic Template
8307	O.D.2.Distribute Notices	As an NY-HX Administrator I want to distribute notices via multiple channels	Notices	OVR.D.2.Distribute Notices
8308	O.D.3.Display Notices	As an NY-HX Administrator I want to display notices in NY-HX (similar to Outlook Inbox or FFE approach)	Notices	OVR.D.3.Display Notices
8309	O.D.4.Inbox Message	As an NY-HX Administrator I want o place a notice/message from within NY-HX into a User's Inbox	Notices	OVR.D.4.Inbox Message

1.1.4 Plan Management

Identifier	Short Name	Primary Text	Category	Title
6907	PM.B.1Annual Load MMC	"As an Exchange Administrator, I want to create a process to receive the Medicaid Managed Care (MMC) Plan data from the Department of Health so I can make the plans available on the Exchange."	Annual Load of Medicaid Managed Care (MMC) Plan Data	Annual Plan Load - 1. Annual Load of Medicaid Managed Care (MMC) Plan Data
6908	PM.B.2Annual Load CHIP	" As an Exchange Administrator, I want to create a process to receive the Child Health Insurance Plan (CHIP) data from the Department of Health so I can make the plans available on the	Annual Load of Child Health Insurance Plan (CHIP) Data	Annual Plan Load - 2. Annual Load of Child Health Insurance Plan (CHIP) Data

Identifier	Short Name	Primary Text	Category	Title
		Exchange."		
6909	PM.B.3Annual Load BHP	"As an Exchange Administrator, I want to create a process to receive the Basic Health Plan (BHP) data from the Department of Health so I can make the plans available on the Exchange."	Annual Load of Basic Health Plan (BHP) Data	Annual Plan Load - 3. Annual Load of Basic Health Plan (BHP) Data
6910	PM.B.4Annual Load Multi	"As an Exchange Administrator, I want to create a process to receive the Multi-State Plan data from the Department of Health (or SERFF) so I can make the plans available on the Exchange."	Annual Load of Multi-State Plan Data	Annual Plan Load - 4. Annual Load of Multi-State Plan Data
6911	PM.C.1Pull Provider Network	"As an Exchange Administrator, I want to create a process to pull provider network data from the Department of Health PNDS so I can make the planâ€™s provider network available on the Exchange."	Pull Provider Network Data from the Provider Network Data System (PNDS)	Provider Network - 1. Pull Provider Network Data from the Provider Network Data System (PNDS)
6912	PM.C.2Pull Geo Axis	"As an Exchange Administrator, I want to create a process to pull GEO Axis data from the Department of Health PNDS so I can return providers within a specific requested geographic location on the Exchange."	Pull GEO-Axis Data from the Provider Network Data System (PNDS)	Provider Network - 2. Pull GEO-Axis Data from the Provider Network Data System (PNDS)
6914	PM.C.3Process Provider Net Changes	"As an Exchange Administrator, I want to build a function to process changes to a plan's s provider network data so I can ensure that the most current provider network data is	Process Changes to Provider Network Data	Provider Network - 3. Process Changes to Provider Network Data

Identifier	Short Name	Primary Text	Category	Title
		available on the Exchange."		
6913	PM.C.4Store Provider Network	"As an Exchange Administrator, I want to create a process to store provider network data received from the Department of Health PNDS so I can associate the network providers with the correct plan on the Exchange."	Store Provider Network Data from the Provider Network Data System (PNDS)	Provider Network - 4. Store Provider Network Data from the Provider Network Data System (PNDS)
6915	PM.D.1Receive Quality Data	"As an Exchange Administrator, I want to create a process to receive plan quality data from the Department of Health QARR system so I can make the plan's quality data available on the Exchange."	Receive Quality Data from the Quality Assurance Reporting Requiremen ts (QARR) System	Plan Quality - 1. Receive Quality Data from the Quality Assurance Reporting Requirements (QARR) System
6916	PM.D.2Store Quality Data	"As an Exchange Administrator, I want to create a process to store plan quality data received from the Department of Health QARR system so I can associate the quality data with the correct plan on the Exchange."	Store Quality Data from the Quality Assurance Reporting Requiremen ts (QARR) System	Plan Quality - 2. Store Quality Data from the Quality Assurance Reporting Requirements (QARR) System
6917	PM.E.1Recertific ation	"As an Exchange Administrator, I want to build a function to process recertification actions so I can make the new/updated plan available on the Exchange."	Process Recertificati on Actions	Operation Maintenance and Compliance Monitoring - 1. Process Recertification Actions
6918	PM.E.2DeCertifi cation	"As an Exchange Administrator, I want to build a function to process decertification actions so I can remove decertified plans from the Exchange."	Process Decertificati on Actions	Operation Maintenance and Compliance Monitoring - 2. Process Decertification Actions

Identifier	Short Name	Primary Text	Category	Title
6919	PM.E.3Decertification Appeal	"Note: This process will be done by DFS/DOH.As an Exchange Administrator, I want to create a process to respond to an appeal of a decertification decision so I can respond to and adjudicate an Issuerâ€™s request for an appeal."	Process Appeal of Decertification Decision	Operation Maintenance and Compliance Monitoring - 3. Process Appeal of Decertification Decision
6920	PM.E.4Suspend Enrollment	"As an Exchange Administrator, I want to build a function to suspend new enrollment into a plan so the plan is not available for new enrollment on the Exchange."	Suspend New Enrollment	Operation Maintenance and Compliance Monitoring - 4. Suspend New Enrollment
6921	PM.E.5Lift Suspension	" As an Exchange Administrator, I want to build a function to remove the suspension on new enrollments into a plan so I can make the plan available on the Exchange for new enrollment."	Lift Suspension on New Enrollment	Operation Maintenance and Compliance Monitoring - 5. Lift Suspension on New Enrollment
6922	PM.E.6Rate Change	"As an Exchange Administrator, I want to build a function to process rate changes so I can make the appropriate rate available in the plan selection results on the Exchange."	Process Rate Change	Operation Maintenance and Compliance Monitoring - 6 Process Rate Change
6923	PM.E.7Benefit Change	" As an Exchange Administrator, I want to build a function to process benefit changes so I can make the appropriate benefits available in the plan selection results	Process Benefit Change	Operation Maintenance and Compliance Monitoring - 7. Process Benefit Change

Identifier	Short Name	Primary Text	Category	Title
		on the Exchange."		
6924	PM.E.8Monitor Provider Network Changes	" As an Exchange Administrator, I want to create a process to monitor and assess changes to a plan's s provider network data so I can ensure that all network adequacy requirements are met."	Monitor and Assess Provider Network Changes	Operation Maintenance and Compliance Monitoring - 8. Monitor and Assess Provider Network Changes
6925	PM.F.1QHP Formulary	" As an Exchange Operator, I want to receive the QHP plan's formulary URL via SERFF so I can display it as part of the plan data on the Exchange."	Accept QHP Plan Formulary URL via SERFF	Formulary - 1. Accept QHP Plan Formulary URL via SERFF
6926	PM.F.2CHIP Formulary	" As an Exchange Operator, I want to receive the CHIP plan's formulary URL via the CHIP template so I can display it as part of the plan data on the Exchange."	Accept CHIP Plan Formulary URL via CHIP Template	Formulary - 2 Accept CHIP Plan Formulary URL via CHIP Template
6927	PM.F.3MMC Formulary	"As an Exchange Operator, I want to receive the MMC plan's formulary URL via the Medicaid template so I can display it as part of the plan data on the Exchange."	Accept MMC Plan Formulary URL via Medicaid Template	Formulary - 3. Accept MMC Plan Formulary URL via Medicaid Template
6928	PM.F.4BHPFormulary	" As an Exchange Operator, I want to receive the BHP plan's formulary URL via the Medicaid template so I can display it as part of the plan data on the Exchange."	Accept BHP Plan Formulary URL via Medicaid Template	Formulary - 4. Accept BHP Plan Formulary URL via Medicaid Template
6929	PM.G.1Design PM System	" As an Exchange Administrator, I want to design a Plan Management System to support the collection and storage of plan data so I can make plans available	Design Plan Management System	Initial NY-HX Load - 1. Design Plan Management System

Identifier	Short Name	Primary Text	Category	Title
		on the Exchange."		
6930	PM.G.2PM Integration	"As an Exchange Administrator, I want to ensure that Plan Management integrates with other Exchange Business Areas so the data flow within the Exchange is accurate and meets consumer needs. "	Integrate Plan Management with other Exchange Business Areas	Initial NY-HX Load - 2.Integrate Plan Management with Other Exchange Business Areas
6931	PM.G.3Initial Load QHP	"As an Exchange Administrator, I want to create a process to receive the QHP data from SERFF and move it from the UAT tables to Production so I can make the plans available on the Exchange."	Initial Load of QHP Data from SERFF moved from UAT Tables to Production	Initial NY-HX Load - 3. Initial Load of QHP Data from SERFF moved from UAT Tables to Production
6932	PM.G.4Initial Load MMC	"As an Exchange Administrator, I want to create a process to move the Medicaid Managed Care (MMC) Plan data from the UAT Table to Production so I can make the plans available on the Exchange."	Initial Load of Medicaid Managed Care (MMC) Plan Data moved from UAT Tables to Production	Initial NY-HX Load - 4. Initial Load of Medicaid Managed Care (MMC) Plan Data moved from UAT Tables to Production
6933	PM.G.5Initial Load CHIP	"As an Exchange Administrator, I want to create a process to move the Child Health Insurance Plan (CHIP) data from the UAT Tables to Production so I can make the plans available on the Exchange. "	Initial Load of Child Health Insurance Plan (CHIP) Data moved from UAT Tables to Production	Initial NY-HX Load - 5. Initial Load of Child Health Insurance Plan (CHIP) Data moved from UAT Tables to Production
6934	PM.G.6Initial Load BHP	"As an Exchange Administrator, I want to create a process to move the Basic Health Plan (BHP) data from the UAT Tables to Production so I can make the plans	Initial Load of Basic Health Plan (BHP) Data moved from UAT Tables to Production	Initial NY-HX Load - 6. Initial Load of Basic Health Plan (BHP) Data moved from UAT Tables to Production

Identifier	Short Name	Primary Text	Category	Title
		available on the Exchange."		
6935	PM.G.7Initial Load Provider	"As an Exchange Administrator, I want to create a process to move the Provider Network data from the UAT Tables to Production so I can make the Provider Network data available on the Exchange. "	Initial Load of Provider Network Data moved from UAT Tables to Production	Initial NY-HX Load - 7. Initial Load of Provider Network Data moved from UAT Tables to Production
6936	PM.G.8Initial Load Quality	"As an Exchange Administrator, I want to create a process to move the Quality data from the UAT Tables to Production so I can make the planâ€™s Quality data available on the Exchange. "	Initial Load of Quality Data moved from UAT Tables to Production	Initial NY-HX Load - 8. Initial Load of Quality Data moved from UAT Tables to Production
7439	PM.A.1Plans Solicitation	"There is No RRC Story associated with this Sub-category. This work is being done by DOH. "	State Solicitations for Plans	Plan Certification - 1. State Solicitations for Plans
7440	PM.A.2Support QHP Certification Process	" There is No RRC Story associated with this Sub-category. This work is being done by DFS/DOH."	Provide Support for the QHP Certification Process	Plan Certification - 2. Provide Support for the QHP Certification Process
7441	PM.A.3Ensure Ongoing QHP Comp	" There is No RRC Story associated with this Sub-category. This work is being done by DFS/DOH."	Ensure Ongoing QHP Compliance with QHP Certification	Plan Certification - 3. Ensure Ongoing QHP Compliance with QHP Certification
8052	PM.B.5.Annual Load Quality	"As an Exchange Administrator, I want to create a process to receive the Quality data from the Department of Health (QARR) so I can make the plans updated quality data available on the Exchange."	Annual Load of Quality Data	Annual Plan Load - 5. Annual Load of Quality Data
8067	PM.G.9Initial Load Multi State	"As an Exchange Administrator, I want to	Initial Load of Multi-	Initial NY-HX Load - 9 - Initial Load of

Identifier	Short Name	Primary Text	Category	Title
		create a process to move the Multi-State Plan data from the UAT Tables to Production so I can make the plans available on the Exchange."	State Plans Data moved from UAT Tables to Production	Multi-State Plans Data moved from UAT Tables to Production

1.1.5 SHOP

Identifier	Short Name	Primary Text	Category	Title
8055	SEE.E.1.Employee Register	" Epic: 1. Confirm EE to ER Roster and capture min EE profile Acceptance Criteria: Comments:"	EmployEE Register	Employee Register - 1. Confirm EE to ER Roster and capture min EE profile
7128	SEE.E.1.EE Plan Enrollment	"Epic: 1.As an employee I want to enter my enrollment information for me and my family. Acceptance Criteria:Comments:"	EmployEE Enrollment	EE Plan Enrollment - 1. Capture EE (and family) Enrollment Information
7124	SEE.E.1.EE Quoting/Select QHP	"Epic: 1. As an employee I would like to see what my costs are to buy insurance through my employer sponsored plan Acceptance Criteria:Comments:"	EmployEE View Premium & Select QHP	EE Quoting/Select QHP - 1. Estimate EE cost to provide Health Ins
7120	SEE.E.1.Eligibility/Subsidy Determination	"Epic: 1. As an employee I want to determine if I am eligible for my employer sponsored coverage or individual coverage .Acceptance Criteria:Comments:"	EmployEE Eligibility	Eligibility/Subsidy Determination - 1. If Affordability test not met
7132	SEE.E.1.Life Events	"Epic: 1. As the Exchange I want to maintain the employees accounts Acceptance Criteria:Comments:"	EmployEE Qualifying Events	Life Events - 1. Add /Change / Dependants
7129	SEE.E.2.EE Plan Enrollment	"Epic: 2.As the Exchange I want to calculate the premium	EmployEE Enrollment	EE Plan Enrollment - 2. Calculate

Identifier	Short Name	Primary Text	Category	Title
		payment for the employee Acceptance Criteria:Comments:"		Premium Payment EE/ER
7125	SEE.E.2.EE Quoting/Select QHP	"Epic: 2.As an employee I would like to be able to sort and filter plans for selection Acceptance Criteria:Comments:"	EmployEE View Premium & Select QHP	EE Quoting/Select QHP - 2. Search /Filter QHPs
7121	SEE.E.2.Eligibility/Subsidy Determination	"Epic: 2. As the Exchange I want to validate the employees address"	EmployEE Eligibility	Eligibility/Subsidy Determination - 2. Verify address
7116	SEE.E.2.Employee Register	"Epic: 2. As an employee I want to enter my login information to see if I am on my employer's roster on the Exchange .Acceptance Criteria:Comments:"	EmployEE Register	Employee Register - 2. Determine eligible for Exchange Services (See Verify in Individual)
7133	SEE.E.2.Life Events	"Epic: 2. As an employee I want the ability to change my information Acceptance Criteria:Comments:"	EmployEE Qualifying Events	Life Events - 2. Change / Delete/ Update Demographics
7130	SEE.E.3.EE Plan Enrollment	"Epic: 3.As the Exchange I want to notify the employer that their employee's are enrolling in health insurance Acceptance Criteria:Comments:"	EmployEE Enrollment	EE Plan Enrollment - 3. Convey Enrollment to EmployER
7126	SEE.E.3.EE Quoting/Select QHP	"Epic: 3.As an employee I would like to be able to select a QHP Acceptance Criteria:Comments:"	EmployEE View Premium & Select QHP	EE Quoting/Select QHP - 3. Choose a Plan
7122	SEE.E.3.Eligibility/Subsidy Determintation	"Epic: 3. As an employee I want to see what my eligibility requirements are through the Exchange if I am an Indian Acceptance Criteria:Comments:"	EmployEE Eligibility	Eligibility/Subsidy Determination - 3. American Indian Citizenship
7117	SEE.E.3.Emplo	"Epic: 3. As an	EmployEE	Employee

Identifier	Short Name	Primary Text	Category	Title
	yee Register	employee I want to determine my eligibility for Exchange Services .Acceptance Criteria:Comments:"	Register	Register - 3. Determine if Subsidized options should be explored. (same rules as Indiv)
7134	SEE.E.3.Life Events	"Epic: 3.As an employee I want the ability to add a dependent, delete a dependent etc Acceptance Criteria:Comments:"	EmployEE Qualifying Events	Life Events - 3. Change in life circumstance
7131	SEE.E.4.EE Plan Enrollment	"Epic: 4.As the Exchange I want to notify the insurer that the employee has enrolled with their plan Acceptance Criteria:Comments:"	EmployEE Enrollment	EE Plan Enrollment - 4. Issuer validation of EE
7127	SEE.E.4.EE Quoting/Select QHP	"Epic: 4. As an employee I would like to be able to check out after selecting my plan Acceptance Criteria:Comments:"	EmployEE View Premium & Select QHP	EE Quoting/Select QHP - 4. Check out
7123	SEE.E.4.Eligibility/Subsidy Determination	"Epic: 4. As the Exchange I need to determine an employee's eligibility for health insurance through their employer's plan Acceptance Criteria:Comments:"	EmployEE Eligibility	Eligibility/Subsidy Determination - 4. Determine how the 270 and 271 Eligibility Requirements be defined for SHOP
7118	SEE.E.4.Employee Register	"Epic: 4. As the Exchange I want to stop an employee from registering for employer sponsored coverage if they are not eligible Acceptance Criteria:Comments:"	EmployEE Register	Employee Register - 4. If Affordability test not met
7135	SEE.E.4.Life Events	"Epic: 4.As an employee I want the Exchange to be able to	EmployEE Qualifying Events	Life Events - 4. COBRA

Identifier	Short Name	Primary Text	Category	Title
		handle my COBRA Acceptance Criteria:Comments:"		
7119	SEE.E.5.Employee Register	"Epic: 5. As an employee I want to register for coverage through the Exchange and attest to being an Indian Acceptance Criteria:Comments:"	EmployEE Register	Employee Register - 5. American Indian/Alaskan Native
7136	SEE.F.1.Re-Enrollment	"Epic: 1. As an employee I want to be able to enroll in health insurance Acceptance Criteria:Comments:"	EmployEE Re-Enrollment	Re-Enrollment - 1. Employee Open Enrollment
7137	SEE.F.2.Re-Enrollment	"Epic: 2. As an employee I want to be able to connect to individual exchange if I don't qualify for employer sponsored insurance Acceptance Criteria:Comments:"	EmployEE Re-Enrollment	Re-Enrollment - 2. Connect back to Individual enrollment
7077	SER.A.1.EmployER Anonymous Shopping	"Epic: As an employer I want to shop anonymously for health insurance to see what plans are available to me and how much it will cost me. Acceptance Criteria:Comments:"	EmployER Anonymous Shopping	EmployER Anonymous Shopping - 1. Rate comparison, plan availability
7078	SER.B.1.Employer Register	"Epic: 1. As the Exchange I want to capture the minimum data necessary to allow an employer to begin their shopping experience .Acceptance Criteria:Comments:"	EmployER Account Setup / Eligibility Determination	Employer Register - 1. Capture minimum ER profile
7079	SER.B.2.Employer Register	"Epic: 2. As an employer I want to know if I am eligible for SHOP services .Acceptance Criteria:Comments:"	EmployER Account Setup / Eligibility Determination	Employer Register - 2. Determine eligible for Exchange Services
7080	SER.B.3.Employer Register	"Epic: 3. As an employer I want to	EmployER Account	Employer Register - 3.

Identifier	Short Name	Primary Text	Category	Title
		create an account on the Exchange .Acceptance Criteria:Comments:"	Setup / Eligibility Determination	Create Exchange Accï¿½t
7081	SER.B.4.Employer Register	"Epic: 4. As an employer I would like to know more about Section 125 benefits that I may be eligible for Acceptance Criteria:Comments:"	EmployER Account Setup / Eligibility Determination	Employer Register - 4. Point to Section 125 requirements
7082	SER.B.5.Employer Register	"Epic: 5. As the Exchange Admin, I would like to process employers who are not eligible for SHOP .Acceptance Criteria:Comments:"	EmployER Account Setup / Eligibility Determination	Employer Register - 5. Exception Processing
7083	SER.B.6.Employer Register	"Epic: 6. As an employer I would like to enter data to find out if I am eligible to offer benefits to my employees through the Exchange .Acceptance Criteria:Comments:"	EmployER Account Setup / Eligibility Determination	Employer Register - 6. EmployER eligibility data
7084	SER.C.1.ER Quoting / Select QHP	"Epic: 1. As an employer I would like to define my contribution level to see what my costs will be for offering health insurance to my employees through the Exchange Acceptance Criteria:Comments:"	EmployER Contribution / Tax Credit Determination	ER Quoting / Select QHP - 1. Calculate employer contribution
7085	SER.C.2.ER Quoting / Select QHP	"Epic: 2.As an employer I would like to estimate the tax credits I am eligible for through the Exchange Acceptance Criteria:Comments:"	EmployER Contribution / Tax Credit Determination	ER Quoting / Select QHP - 2. Estimate Employer Tax Credit
7086	SER.C.3.ER Quoting / Select QHP	"Epic: 3. As an employer I would like to see what options for financing I may have through Section 125 and how it affects my	EmployER Contribution / Tax Credit Determination	ER Quoting / Select QHP - 3. Section 125 eligibility

Identifier	Short Name	Primary Text	Category	Title
		SHOP eligibility Acceptance Criteria:Comments:"		
7087	SER.C.4.ER Quoting / Select QHP	"Epic: 4. As an employer I would like to be able to estimate my total cost for providing health insurance to my employees through the Exchang eAcceptance Criteria:Comments:"	EmployER Plan Selection	ER Quoting / Select QHP - 4. Estimate ER cost to provide Health Ins
7088	SER.C.5.ER Quoting / Select QHP	"Epic: 5.As an employer I would like the capability to search and filter QHPs during my shopping experience on the Exchange Acceptance Criteria:Comments:"	EmployER Plan Selection	ER Quoting / Select QHP - 5. Search /Filter Plans
7089	SER.C.6.ER Quoting / Select QHP	"Epic: 6.As an employer I would like to choose a QHP that I can offer my employees Acceptance Criteria:Comments:"	EmployER Plan Selection	ER Quoting / Select QHP - 6. Choose Level/Plan
7090	SER.C.7.ER Quoting / Select QHP	"Epic: 7 As an employer I would like to be able to calculate the cost of offering health insurance through the Exchange and pass this information on to my employees Acceptance Criteria:Comments:"	EmployER Plan Selection	ER Quoting / Select QHP - 7. Provide EE affordability guidance
7091	SER.C.8.ER Quoting / Select QHP	"Epic: 8.As an employer once I've selected my plans and entered all my information I would like a process to check out of the Exchange Acceptance Criteria:Comments:"	EmployER Plan Selection	ER Quoting / Select QHP - 8. Check out
7092	SER.D.1.Employee Roster	"Epic: 1. As an employer I would like a	EmployER Enroll /	Employee Roster - 1.

Identifier	Short Name	Primary Text	Category	Title
		simple process for entering my employee information such as Name, Household (plan) type and zip code so they can enroll in health insurance Acceptance Criteria:Comments:"	EmployEE Roster Submittal	Enter minimal EE data
7093	SER.D.2.Employee Roster	"Epic: 2. As an employer I would like to have information on my employee roster where I can identify those employees who would be eligible for COBRA Acceptance Criteria:Comments:"	EmployER Enroll / EmployEE Roster Submittal	Employee Roster - 2. Enter COBRA Eligible minimal data
7094	SER.D.3.Employee Roster	"Epic: 3.As an employer I would like the Exchange to have a process in place where I can batch upload my employee roster data Acceptance Criteria:Comments:"	EmployER Enroll / EmployEE Roster Submittal	Employee Roster - 3. Batch Roster up-load
7095	SER.D.4.Employee Roster	"Epic: 4.As an employer I would like to be able to enter my information on my employee roster Acceptance Criteria:Comments:"	EmployER Enroll / EmployEE Roster Submittal	Employee Roster - 4. Capture ER Enrollment Information
7096	SER.D.5.Employee Roster	"Epic: 5.As an Exchange Admin I need to have a process in place to verify that the small business registering on the Exchange is a valid NY company Acceptance Criteria:Comments:"	EmployER Enroll / EmployEE Roster Submittal	Employee Roster - 5. Validate Corp
7097	SER.D.6.Employee Roster	"Epic: 6.As an Exchange Admin I need to have a process in place to notify employees that	EmployER Enroll / EmployEE Roster Submittal	Employee Roster - 6. Convey Enrollment to EmployEEs

Identifier	Short Name	Primary Text	Category	Title
		their employer has enrolled in health insurance through the Exchange Acceptance Criteria:Comments:"		
7098	SER.E.1.Aggregate Premium	"Epic: 1.As an Exchange Admin I need to have a process in place to aggregate premium payments for enrolled employers Acceptance Criteria:Comments:"	EmployER Bill, Collect, A/P, A/R, Admin	Aggregate Premium - 1. Aggregate Premium Payment
7099	SER.E.2. Aggregate Premium	"Epic: 2. As the Exchange I need to abide by all 820 payment requirements Acceptance Criteria:Comments:"	EmployER Bill, Collect, A/P, A/R, Admin	Aggregate Premium - 2. 820 Payment Requirements
7100	SER.E.3.Aggregate Premium	"Epic: 3. As the Exchange I need to be able to seamlessly flow funds from SHOP through Financial Management in order to make payments to employers Acceptance Criteria:Comments:"	EmployER Bill, Collect, A/P, A/R, Admin	Aggregate Premium - 3. Integration between Financial Management and SHOP
7101	SER.F.1.Appeals	"Epic: 1. As an employer I would like to be able to appeal decisions made by the Exchange Acceptance Criteria:Comments:"	Appeals	ER Appeals - 1. Ability to appeal a decision through the Exchange.
7138	SER.G.1.Appeals	"Epic: 1. As an employee I want the ability to appeal an Exchange decision Acceptance Criteria:Comments:"	Appeals	Appeals - 1. Ability to appeal a decision through the Exchange.
7102	SER.G.1.Monitor and reconcile EE Enrollment	"Epic: 1.As an employer, as my roster changes, I would like the ability to re-estimate my health insurance costs through the Exchange Acceptance Criteria:Comments:"	Reconciliations	Monitor and Reconcile EE Enrollment - 1. Re-Estimate ER costs

Identifier	Short Name	Primary Text	Category	Title
7111	SER.G.1.Monitor and reconcile EE Enrollment	"Epic: 10.As the Exchange I need to have a process in place to deal with employer questions by offering different avenues of communication Acceptance Criteria:Comments:"	New Hires / Terminations / Account Management	Monitor and Reconcile EE Enrollment - 10. Directing ER to 800 number or mailing address
7112	SER.G.1.Monitor and reconcile EE Enrollment	"Epic: 11.As the Exchange I need to be able to reflect current employer information on the web site Acceptance Criteria:Comments:"	New Hires / Terminations / Account Management	Monitor and Reconcile EE Enrollment - 11. Reflect Determination in Web Site
7103	SER.G.2.Monitor and reconcile EE Enrollment	"Epic: 2.As an employer I would like the ability to offer payroll deduction to my employees through the Exchange Acceptance Criteria:Comments:"	Reconciliations	Monitor and Reconcile EE Enrollment - 2. Present P/R deduction schedule
7104	SER.G.3.Monitor and reconcile EE Enrollment	"Epic: 3.As the Exchange I need to have a process in place to produce invoices Acceptance Criteria:Comments:"	Reconciliations	Monitor and Reconcile EE Enrollment - 3. First Invoice
7105	SER.G.4.Monitor and reconcile EE Enrollment	"Epic: 4.As the Exchange I need to have a process in place to calculate an employer's tax credits Acceptance Criteria:Comments:"	Reconciliations	Monitor and Reconcile EE Enrollment - 4. ER Tax Credit
7106	SER.G.5.Monitor and reconcile EE Enrollment	"Epic: 5.As the Exchange I need to have a notification process in place to let issurers know when employees and employers have enrolled in their plans Acceptance Criteria:Comments:	Reconciliations	Monitor and Reconcile EE Enrollment - 5. Plan Notification
7107	SER.G.6.Monito	"Epic: 6.As the	Reconciliati	Monitor and

Identifier	Short Name	Primary Text	Category	Title
	r and reconcile EE Enrollment	Exchange I need the ability to notify employees that their employers are offering health insurance through the ExchangeAcceptance Criteria:Comments:"	ons	Reconcile EE Enrollment - 6. EE Notification
7108	SER.G.7.Monitor and reconcile EE Enrollment	"Epic: 7.As an employer I would like the ability to add/change/delete employees' information on my roster Acceptance Criteria:Comments:"	New Hires / Terminations / Account Management	Monitor and Reconcile EE Enrollment - 7. Add /Change / Delete Census
7109	SER.G.8.Monitor and reconcile EE Enrollment	"Epic: 8.As an employer I would like to be able to update my information as it changes throughout the year Acceptance Criteria:Comments:"	New Hires / Terminations / Account Management	Monitor and Reconcile EE Enrollment - 8. Change / Delete/ Update Demographics
7110	SER.G.9.Monitor and reconcile EE Enrollment	"Epic: 9.As the Exchange I need to be able to handle changes in employee life events Acceptance Criteria:Comments:"	New Hires / Terminations / Account Management	Monitor and Reconcile EE Enrollment - 9. Change in life circumstance
7113	SER.H.1.ER Enrollment	"Epic: 1.As an employer I would like to be able to re-enroll in SHOP benefits through the Exchange Acceptance Criteria:Comments:"	EmployER Re-enroll	ER Enrollment - 1. EmployER entry to pick-up and continue
7114	SER.H.2.ER Enrollment	"Epic: 2. As an employer I would like the ability to change my benefit offerings to my employees before a subsequent open enrollment period Acceptance Criteria:Comments:"	EmployER Re-enroll	ER Enrollment - 2. Change my plan offerings during open enrollment period
7183	SER.I.1.Process Authorized Broker/Agents	"As a NY-HX Administrator, I need to develop an approval process for	1. Add-Change-Delete (ACD)	Brokers/Agents SHOP - 1. Add-Change-Delete (ACD)

Identifier	Short Name	Primary Text	Category	Title
		Brokers/Agents and the ability to channel additions, changes and deletions for system updates."	authorized Broker/Agents	authorized Broker/Agents
7184	SER.I.2.Training and Testing	"As a NY-HX Representative, I need to develop a program to train Brokers/Agents on the ACA and NY-HX."	2. Training and Testing	Brokers/Agents SHOP - 2. Training and Testing
7185	SER.I.3.SHOP ER Authorized Broker	"As an employer I would like to be able to designate a Broker/Agent of record through the NY-HX."	3. SHOP ER authorizes Broker/Agents.	Brokers/Agents SHOP - 3. SHOP ER authorizes Broker/Agents.
7186	SER.I.4.Access Portfolio	"As a Broker/Agent, I would like to be able to access the NY-HX system to manage my portfolio of business."	4. Access their portfolio (Porspects and accounts)	Brokers/Agents SHOP - 4. Access their portfolio (Prospects and accounts)
7187	SER.I.5.Identity of Employer	"As a Broker/Agent, I would like to be able to access the NY-HX system using the identity of Employers I represent."	5. Access to take on identity of an Employer in their Portfolio	Brokers/Agents SHOP - 5. Access to take on identity of an Employer in their Portfolio
7188	SER.I.6.Capture Broker/Agent Metrics	"As a DOH Administrator, I need to generate reports showing enrollment and other activities of Brokers/Agents."	6. Capture Broker/Agent activity metrics	Brokers/Agents SHOP - 6. Capture Broker/Agent activity metrics