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<tbody>
<tr>
<td>8055</td>
<td>Text</td>
<td>SEE.A.1.Employee Register</td>
<td>&quot;Epic: 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:&quot;</td>
<td>EmployEE Register</td>
<td>Employee Register - 1. Confirm EE to ER Roster and capture min EE profile</td>
</tr>
<tr>
<td>7128</td>
<td>Text</td>
<td>SEE.D.1.Employee Plan Enrollment</td>
<td>&quot;Epic: As an employee I want to enter my enrollment information for myself and my family. Acceptance Criteria: Comments:&quot;</td>
<td>EmployEE Enrollment</td>
<td>EE Plan Enrollment - 1. Capture EE (and family) Enrollment Information</td>
</tr>
<tr>
<td>7124</td>
<td>Text</td>
<td>SEE.C.1.EE Quoting/Select QHP</td>
<td>&quot;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:&quot;</td>
<td>EmployEE View Premium &amp; Select QHP</td>
<td>EE Quoting/Select QHP - 1. Estimate EE cost to provide Health Ins</td>
</tr>
<tr>
<td>7120</td>
<td>Text</td>
<td>SEE.B.1.Eligibility/Subsidy Determination</td>
<td>&quot;Epic: As an employee I want to determine if I am eligible for my employer sponsored coverage. Acceptance Criteria: Comments:&quot;</td>
<td>EmployEE Eligibility</td>
<td>Eligibility/Subsidy Determination - 1. If Affordability test not met</td>
</tr>
<tr>
<td>7132</td>
<td>Text</td>
<td>SEE.E.1.Life Events</td>
<td>&quot;Epic: 1. As the Exchange I want to maintain the employees accounts. Acceptance Criteria: Comments:&quot;</td>
<td>EmployEE Qualifying Events</td>
<td>Life Events - 1. Add/Change/Dependants</td>
</tr>
<tr>
<td>7129</td>
<td>Text</td>
<td>SEE.D.2.EE Plan Enrollment</td>
<td>&quot;Epic: As the Exchange I need to calculate the premium payment for the employee. Acceptance Criteria: Comments:&quot;</td>
<td>EmployEE Enrollment</td>
<td>EE Plan Enrollment - 2. Calculate Premium Payment EE/ER</td>
</tr>
<tr>
<td>Identifier</td>
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</table>
| 7125       | Text           | SEE.C.2.EE Quoting/Select QHP | "Epic: 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       | Text           | SEE.B.2.Eligibility/Subsidy Determination | "Epic: As the Exchange I need to validate the employees address" | EmployEE Eligibility | Eligibility/Subsidy Determination - 2. Verify address |
| 7116       | Text           | SEE.A.2.Employee Register | "Epic: As an employee I want to determine my eligibility for Exchange Services..Acceptance Criteria: Comments:"
|            |                |            | EmployEE Register | Employee Register - 2. Determine eligible for Exchange Services (See Verify in Individual) |
| 7133       | Text           | SEE.E.2.Life Events | "Epic: As an employee I want it to be possible to change my plan selection in the Exchange in relation to life events" | EmployEE Qualifying Events | Life Events - 2. Change / Delete/ Update Demographics |
| 7130       | Text           | SEE.D.3.EE Plan Enrollment | "Epic: 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       | Text           | SEE.C.3.EE Quoting/Select QHP | "Epic: 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       | Text           | SEE.B.3.Eligibility/Subsidy Determination | "Epic: 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 |
| 7134       | Text           | SEE.E.3.Life Events | "Epic: As an employee I want the ability to add a dependent, delete a dependent etc Acceptance Criteria: Comments:"
<p>|            |                |            | EmployEE Qualifying Events | Life Events - 3. Change in life circumstance |
| 7131       | Text           | SEE.D.4.EE Plan | &quot;Epic: As the Employment&quot; | EmployEE | EE Plan |</p>
<table>
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<tr>
<td>Enrollment</td>
<td>Enrollment</td>
<td>Exchange I want to notify the insurer that the employee has enrolled with their plan</td>
<td>Acceptance Criteria: Comments:</td>
<td>Enrollment</td>
<td>Enrollment - 4. Issuer validation of EE</td>
</tr>
<tr>
<td>7127</td>
<td>Text</td>
<td>SEE.C.4.EE Quoting/Select QHP</td>
<td>“Epic: As an employee I would like to be able to confirm the selection of my plan after selecting my plan</td>
<td>EmployEE View Premium &amp; Select QHP</td>
<td>EE Quoting/Select QHP - 4. Check out</td>
</tr>
<tr>
<td>7123</td>
<td>Text</td>
<td>SEE.B.4.Eligibility/Subsidy Determination</td>
<td>“Epic: As the Exchange I need to determine an employee's eligibility for health insurance through their employer’s plan</td>
<td>Eligibility/Eligibility</td>
<td>Eligibility/Subsidy Determination - 4. Determine how the 270 and 271 Eligibility Requirements be defined for SHOP</td>
</tr>
<tr>
<td>7118</td>
<td>Text</td>
<td>SEE.A.4.Employee Register</td>
<td>“Epic: As the Exchange I want to stop an employee from registering for employer sponsored coverage if they are not eligible</td>
<td>EmployEE Register</td>
<td>Employee Register - 4. If Affordability test not met</td>
</tr>
<tr>
<td>7135</td>
<td>Text</td>
<td>SEE.E.4.Life Events</td>
<td>“Epic: 4. As an employee I want the Exchange to be able to handle my COBRA Acceptance Criteria: Comments:”</td>
<td>EmployEE Qualifying Events</td>
<td>Life Events - 4. COBRA</td>
</tr>
<tr>
<td>7119</td>
<td>Text</td>
<td>SEE.A.5.Employee Register</td>
<td>“Epic As an employee I want to register for coverage through the Exchange and attest to being an Indian Acceptance Criteria: Comments:”</td>
<td>EmployEE Register</td>
<td>Employee Register - 5. American Indian/Alaskan Native</td>
</tr>
<tr>
<td>7136</td>
<td>Text</td>
<td>SEE.F.1.Re-Enrollment</td>
<td>“Epic: As an employee I want to be able to re-enroll in health insurance Acceptance Criteria: Comments:”</td>
<td>EmployEE Re-Enrollment</td>
<td>Re-Enrollment - 1. Employee Open Enrollment</td>
</tr>
<tr>
<td>8010</td>
<td>Text</td>
<td>SEE.G.1.Appeals-Employee</td>
<td>Epic: As an employee I want the ability to appeal an Exchange decision and register complaints with the Exchange.</td>
<td>Appeals</td>
<td>SEE.G.1.Appeals-Employee/Ability to appeal a decision through the Exchange.</td>
</tr>
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<tr>
<td>7077</td>
<td>Text</td>
<td>SER.A.1.EmployER Anonymous Shopping</td>
<td>&quot;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. Acceptance Criteria:Comments:&quot;</td>
<td>EmployER Anonymous Shopping</td>
<td>EmployER Anonymous Shopping - 1. Rate comparison, plan availability</td>
</tr>
<tr>
<td>7078</td>
<td>Text</td>
<td>SER.B.1.Employer Register</td>
<td>&quot;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:&quot;</td>
<td>EmployER Account Setup / Eligibility Determination</td>
<td>Employer Register - 1. Capture minimum ER profile</td>
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<tr>
<td>7082</td>
<td>Text</td>
<td>SER.B.5.Employer Register</td>
<td>&quot;Epic: 5. As the Exchange, I would like to notify employers who are not eligible for SHOP. Acceptance Criteria: Comments:&quot;</td>
<td>EmployER Account Setup / Eligibility Determination</td>
<td>Employer Register - 5. Exception Processing</td>
</tr>
<tr>
<td>7083</td>
<td>Text</td>
<td>SER.B.6.Employer Register</td>
<td>&quot;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:&quot;</td>
<td>EmployER Account Setup / Eligibility Determination</td>
<td>Employer Register - 6. EmployER eligibility data</td>
</tr>
<tr>
<td>7084</td>
<td>Text</td>
<td>SER.C.1.Employer Quoting / Select QHP</td>
<td>&quot;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:&quot;</td>
<td>EmployER Contribution / Tax Credit Determination</td>
<td>ER Quoting / Select QHP - 1. Calculate employer contribution</td>
</tr>
<tr>
<td>7085</td>
<td>Text</td>
<td>SER.C.2.Employer Quoting / Select</td>
<td>&quot;Epic: 2. As an employer I would like</td>
<td>EmployER Contribution /</td>
<td>ER Quoting / Select QHP - 2.</td>
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<tr>
<td>QHP</td>
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<td>to estimate the tax credits I am eligible for through the Exchange Acceptance Criteria: Comments:</td>
<td>Tax Credit Determination</td>
<td>Estimate Employer Tax Credit</td>
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<tr>
<td>7087</td>
<td>Text</td>
<td>SER.C.4.Employer Quoting / Select QHP</td>
<td>&quot;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 Exchange Acceptance Criteria: Comments:&quot;</td>
<td>EmployER Plan Selection</td>
<td>ER Quoting / Select QHP - 4. Estimate ER cost to provide Health Ins</td>
</tr>
<tr>
<td>7088</td>
<td>Text</td>
<td>SER.C.5.Employer Quoting / Select QHP</td>
<td>&quot;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:&quot;</td>
<td>EmployER Plan Selection</td>
<td>ER Quoting / Select QHP - 5. Search /Filter Plans</td>
</tr>
<tr>
<td>7089</td>
<td>Text</td>
<td>SER.C.6.Employer Quoting / Select QHP</td>
<td>&quot;Epic: As an employer I would like to choose one or more Qualified Health Plans that I can offer my employees Acceptance Criteria: Comments:&quot;</td>
<td>EmployER Plan Selection</td>
<td>ER Quoting / Select QHP - 6. Choose Level/Plan</td>
</tr>
<tr>
<td>7090</td>
<td>Text</td>
<td>SER.C.7.Employer Quoting / Select QHP</td>
<td>&quot;Epic: As an employer I would like to be able to pass this information on to my employees regarding costs and plans offered. Acceptance Criteria: Comments:&quot;</td>
<td>EmployER Plan Selection</td>
<td>ER Quoting / Select QHP - 7. Provide EE affordability guidance</td>
</tr>
<tr>
<td>7091</td>
<td>Text</td>
<td>SER.C.8.ER Quoting / Select QHP</td>
<td>&quot;Epic: As an employer once I've selected my plans and entered all my information I would like a process to confirm selections in the Exchange Acceptance Criteria: Comments:&quot;</td>
<td>EmployER Plan Selection</td>
<td>ER Quoting / Select QHP - 8. Check out</td>
</tr>
<tr>
<td>7092</td>
<td>Text</td>
<td>SER.D.1.Employee Roster</td>
<td>&quot;Epic: 1. As an employer I would like a simple process for entering my employee information such as</td>
<td>EmployER Enroll / EmployEE Roster Submittal</td>
<td>Employee Roster - 1. Enter minimal EE data</td>
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<tr>
<td>7094</td>
<td>Text</td>
<td>SER.D.3.Employee Roster</td>
<td>&quot;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:&quot;</td>
<td>EmployER Enroll / EmployEE Roster Submittal</td>
<td>Employee Roster - 3. Batch Roster upload</td>
</tr>
<tr>
<td>7096</td>
<td>Text</td>
<td>SER.D.5.Employee Roster</td>
<td>&quot;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:&quot;</td>
<td>EmployER Enroll / EmployEE Roster Submittal</td>
<td>Employee Roster - 5. Validate Corp</td>
</tr>
<tr>
<td>7097</td>
<td>Text</td>
<td>SER.D.6.Employee Roster</td>
<td>&quot;Epic: As an Exchange Admin I need to have a process in place to notify employees that their employer has enrolled in health insurance through the Exchange and will offer selected plans Acceptance Criteria: Comments:&quot;</td>
<td>EmployER Enroll / EmployEE Roster Submittal</td>
<td>Employee Roster - 6. Convey Enrollment to EmployEES</td>
</tr>
<tr>
<td>7098</td>
<td>Text</td>
<td>SER.E.1.Aggregate Premium</td>
<td>&quot;Epic: 1. As an Exchange Admin I need to have a process in place to aggregate premium payments for enrolled employers Acceptance Criteria: Comments:&quot;</td>
<td>Aggregate Premium - 1. Aggregate Premium Payment</td>
<td></td>
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<tr>
<td>7099</td>
<td>Text</td>
<td>SER.E.2.Aggregate Premium</td>
<td>&quot;Epic: 2. As the Exchange I need to abide by all 820 payment requirements Acceptance Criteria: Comments: An EDI 820 Payment Order/Remittance Advice is an electronic document that can be used to initiate payments and</td>
<td>Aggregate Premium - 2. 820 Payment Requirements</td>
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<td>send remittance information. EDI stands for Electronic Data Interchange. Companies use EDI to reduce the errors and costs associated with the manual keying of data, and to speed up the process of sending and receiving Purchase 820.</td>
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<td>A trading partner will send an 820 Payment Order/Remittance Advice to a supplier when payment is made, especially in the case of an Electronic Funds Transfer. This document provides suppliers with the ability to reconcile which invoices have been paid in full for any given payment.</td>
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<td>EDI is a mature electronic document format that has been carefully defined both by the companies that require their trading partners to use EDI and by standards bodies. The two recognized standards for EDI are ANSI X.12 and UN/EDIFACT. ANSI X.12 is by far the most widely used standard in the United States. UN/EDIFACT is more popular outside the United States, although it is used by US automotive manufactures.</td>
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<td>Each EDI Payment Order/Remittance Advice document will have data organized into segments and</td>
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Each segment contains at least one data element. Each data element is a data field. The standards bodies have allowed for every conceivable possibility for data on the EDI Payment Order/Remittance Advice document. Any one company will use a small subset of the available choices within the ANS X.12 or UN/EDIFACT standards.

Each company that requires its suppliers to use EDI will have an EDI Guide or mapping document. The EDI Guide will specify each segment and data element, the allowable values for each, and the applicable business rules that must be followed. EDI guides are detailed and extensive. It is not unusual for an EDI Guide to be more than 100 pages long.

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<td>7100</td>
<td>Text</td>
<td>SER.E.3.Aggregate Premium</td>
<td>“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:”</td>
<td>EmployER Bill, Collect, A/P, A/R, Admin</td>
<td>Aggregate Premium - 3. Integration between Financial Management and SHOP</td>
</tr>
<tr>
<td>7101</td>
<td>Text</td>
<td>SER.F.1.Appeals</td>
<td>“Epic: 1. As an employer I would like to be able to appeal decisions made by the Exchange Acceptance Criteria:Comments:”</td>
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<td>Appeals - 1. Ability to appeal a decision through the Exchange.</td>
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<tr>
<td>7138</td>
<td>Text</td>
<td>SER.G.1.Appeals</td>
<td>“Epic: 1. As an employee I want the</td>
<td></td>
<td>Appeals - 1. Ability to appeal a</td>
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<tr>
<td>7102</td>
<td>Text</td>
<td>SER.G.1. Monitor and reconcile EE Enrollment</td>
<td>&quot;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:&quot;</td>
<td>Reconciliations</td>
<td>Monitor and Reconcile EE Enrollment - 1. Re-Estimate ER costs</td>
</tr>
<tr>
<td>7111</td>
<td>Text</td>
<td>SER.G.10. Monitor and reconcile EE Enrollment</td>
<td>&quot;Epic: As the Exchange I need to have a process in place to deal with employer needs (i.e. enrollment) by offering different avenues of communication. Acceptance Criteria: Comments:&quot;</td>
<td>New Hires / Terminations / Account Management</td>
<td>Monitor and Reconcile EE Enrollment - 10. Directing ER to 800 number or mailing address</td>
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<tr>
<td>7103</td>
<td>Text</td>
<td>SER.G.2. Monitor and reconcile EE Enrollment</td>
<td>&quot;Epic: 2. As an employer I would like the ability to offer payroll deduction to my employees through the Exchange. Acceptance Criteria: Comments:&quot;</td>
<td>Reconciliations</td>
<td>Monitor and Reconcile EE Enrollment - 2. Present P/R deduction schedule</td>
</tr>
<tr>
<td>7104</td>
<td>Text</td>
<td>SER.G.3. Monitor and reconcile EE Enrollment</td>
<td>&quot;Epic: As the Exchange I need to have a process in place to produce invoices for employer list billing. Acceptance Criteria: Comments:&quot;</td>
<td>Reconciliations</td>
<td>Monitor and Reconcile EE Enrollment - 3. First Invoice</td>
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<tr>
<td>7105</td>
<td>Text</td>
<td>SER.G.4. Monitor and reconcile EE Enrollment</td>
<td>&quot;Epic: 4. As the Exchange I need to have a process in place to calculate an employer's tax credits. Acceptance Criteria: Comments:&quot;</td>
<td>Reconciliations</td>
<td>Monitor and Reconcile EE Enrollment - 4. ER Tax Credit</td>
</tr>
<tr>
<td>7106</td>
<td>Text</td>
<td>SER.G.5. Monitor and reconcile EE Enrollment</td>
<td>&quot;Epic: 5. As the Exchange I need to have a notification process in place to let issuers know when employees and employers have enrolled in their plans. Acceptance Criteria: Comments:&quot;</td>
<td>Reconciliations</td>
<td>Monitor and Reconcile EE Enrollment - 5. Plan Notification</td>
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<td>7107</td>
<td>Text</td>
<td>SER.G.6.Monitor and reconcile EE Enrollment</td>
<td>&quot;Epic: 6. As the Exchange I need the ability to notify employees that their employers are offering health insurance through the Exchange Acceptance Criteria: Comments:&quot;</td>
<td>Reconciliations</td>
<td>Monitor and Reconcile EE Enrollment - 6. EE Notification</td>
</tr>
<tr>
<td>7108</td>
<td>Text</td>
<td>SER.G.7.Monitor and reconcile EE Enrollment</td>
<td>&quot;Epic: 7. As an employer I would like the ability to add/change/delete employees' information on my roster Acceptance Criteria: Comments:&quot;</td>
<td>New Hires / Terminations / Account Management</td>
<td>Monitor and Reconcile EE Enrollment - 7. Add /Change / Delete Census</td>
</tr>
<tr>
<td>7109</td>
<td>Text</td>
<td>SER.G.8.Monitor and reconcile EE Enrollment</td>
<td>&quot;Epic: 8. As an employer I would like to be able to update my information as it changes throughout the year Acceptance Criteria: Comments:&quot;</td>
<td>New Hires / Terminations / Account Management</td>
<td>Monitor and Reconcile EE Enrollment - 8. Change / Delete/ Update Demographics</td>
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<td>7114</td>
<td>Text</td>
<td>SER.H.2.ER Enrollment</td>
<td>&quot;Epic: As an employer I need the ability to change my benefit offerings to my employees before a subsequent open enrollment period Acceptance Criteria: Comments:&quot;</td>
<td>EmployER Re-enroll</td>
<td>ER Enrollment - 2. Change my plan offerings during open enrollment period</td>
</tr>
<tr>
<td>7183</td>
<td>Text</td>
<td>SER.I.1.Process Authorized Broker/Agents</td>
<td>&quot;As a NY-HX Administrator, I need to maintain an up to date listing of certified brokers.&quot;</td>
<td>1. Add-Change-Delete (ACD) authorized Broker/Agents</td>
<td>Brokers/Agents SHOP - 1. Add-Change-Delete (ACD) authorized Broker/Agents</td>
</tr>
<tr>
<td>7185</td>
<td>Text</td>
<td>SER.I.3.SHOP ER Authorized Broker</td>
<td>&quot;As an employer I need to be able to designate a Broker/Agent of record through the NY-HX.&quot;</td>
<td>3. SHOP ER authorizes Broker/Agents.</td>
<td>Brokers/Agents SHOP - 3. SHOP ER authorizes Broker/Agents</td>
</tr>
<tr>
<td>7187</td>
<td>Text</td>
<td>SER.I.5.Identity of Employer</td>
<td>&quot;As a Broker/Agent, I would like to be able to access the NY-HX system using the identity of Employers I represent.&quot;</td>
<td>5. Access to take on identity of an Employer in their Portfolio</td>
<td>Brokers/Agents SHOP - 5. Access to take on identity of an Employer in their Portfolio</td>
</tr>
<tr>
<td>Identifier</td>
<td>Artifact format</td>
<td>Short Name</td>
<td>Primary Text</td>
<td>Category</td>
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<tr>
<td>7188</td>
<td>Text</td>
<td>SER.I.6.Capture Broker/Agent Metrics</td>
<td>&quot;As a DOH Administrator, I need to generate reports showing enrollment and other activities of Brokers/Agents.&quot;</td>
<td>6. Capture Broker/Agent activity metrics</td>
<td>Brokers/Agents SHOP - 6. Capture Broker/Agent activity metrics</td>
</tr>
</tbody>
</table>