

ROAM Enhancements

This document outlines ROAM enhancements effective August 2014.

Individual Enrollment Dashboard

The Individual Dashboard enhancements will enable you to more efficiently manage customers enrolled in individual medically underwritten plans, our retail platform, and the Federally-Facilitated Marketplace all in one, easy to use location.

Enhanced Individual Enrollment List Screen

New Fields

The following new fields are added to the Individual Enrollment grid on the Individual Enrollment Screen:

- Agent displays the name of the enrolling agent associated with the producing agency.
- NPN displays the national producer number for the enrolling agent.
- Status displays the status of the application (Active, Cancelled, and Void).
- Paid Through Date displays the last date of effective coverage based on payments made for medical products.
- Line of Business provides a classification of offered products (medical, dental, and vision) at the application level.
- Source defines the source of the enrollment (i.e., CNX, CMS, EH, and NX). CNX= Retail platform, CMS= FFM, EH= ROAM and NX= Direct At the dashboard, the primary agencies and producing agencies can see their complete book of business, regardless of the enrollment source.

Individual Enrollment List for PA20589A BROKERTEST Paid Through Agent **NPN** Source **Business** Export 01/01/2014 CNX 01/01/2014 Active CNX 01/01/2014 Active Dental CNX Active 01/01/2014 Active Vision CNX 01/01/2014 Active CNX Dental CNX 01/01/2014 Dental Total Customers: 21 Page Control

123 Lines per page: 10 ▼ Go to page: 1

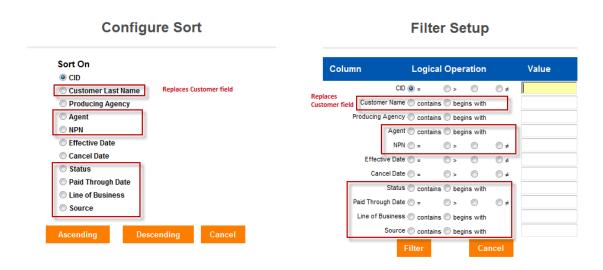
Individual Detail PreEnrollment List Sort Filter Refresh

New Links

A new *Export* hyperlink is added to the left navigation panel. This link enables users to create an Excel file from the list of cases displayed on the screen.

New Filter and Sort Options

Filter and Sort functions for the grid are expanded to include the following new options, which are in displayed in the red boxes below:

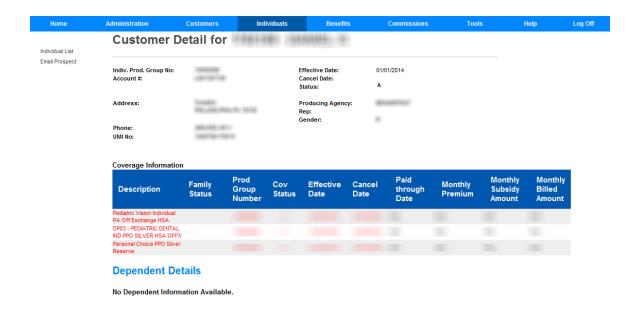


Note: when the Customer Last Name is selected, the system automatically uses the first name as the secondary sort field.

Updated Customer Detail Screen

The following new fields are added to the Coverage Information grid on the Customer Detail Screen for enrolled individuals:

- Paid Through Date displays the last date of effective coverage based on payments made for medical products. This field is blank for active individual medically underwritten plan customers.
- Monthly Premium displays the latest recorded premium for the customer. This field is blank for active individual medically underwritten plan customers.
- Monthly Subsidy Amount displays the subsidy the customer received. This field populates with N/A for active individual medically underwritten plan customers.
- Monthly Billed Amount displays the monthly premium amount minus the monthly subsidy amount. This field is blank for active individual medically underwritten plan customers.



Updated Individual Customer Search Criteria Page

The following updates are available on the Individual Customer Search page:

- Added new search Status field.
- Renamed USI field to USI/UMI Number.

Individual Customer Search Criteria

