

## 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.

Print  
Email Prospect  
Individual Detail  
PreEnrollment List  
Sort  
Filter  
Refresh  
Search  
Export

### Individual Enrollment List for PA20589A BROKERTEST

Sort
Filter

CID	Customer Name	Producing Agency	Agent	NPN	Effective Date	Cancel Date	Status	Paid Through Date	Line of Business	Source
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Dental	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Medical	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Vision	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Dental	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Medical	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Vision	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Dental	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Medical	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Vision	CNX
00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	01/01/2014		Active		Dental	CNX

Total Customers: 21

Page Control

1 2 3

Lines per page: 10 Go to page: 1 of 3

## 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:

### Configure Sort

**Sort On**

☒ CID

☐ Customer Last Name Replaces Customer field

☐ Producing Agency

☐ Agent

☐ NPN

☐ Effective Date

☐ Cancel Date

☐ Status

☐ Paid Through Date

☐ Line of Business

☐ Source

### Filter Setup

Column	Logical Operation	Value
CID	= > < >= <=	
Replaces Customer field	Customer Name contains begins with	
	Producing Agency contains begins with	
	Agent contains begins with	
	NPN = > < >= <=	
	Effective Date = > < >= <=	
	Cancel Date = > < >= <=	
	Status contains begins with	
	Paid Through Date = > < >= <=	
	Line of Business contains begins with	
	Source contains begins with	

*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.

HomeAdministrationCustomers**Individuals**BenefitsCommissionsToolsHelpLog Off

Individual List  
Email Prospect

### Customer Detail for [REDACTED]

Indiv. Prod. Group No: [REDACTED]  
Account #: [REDACTED]

Effective Date: 01/01/2014  
Cancel Date:  
Status: A

Address: [REDACTED]  
[REDACTED]

Producing Agency: [REDACTED]  
Rep:  
Gender: M

Phone: [REDACTED]  
UMI No: [REDACTED]

#### Coverage Information

Description	Family Status	Prod Group Number	Cov Status	Effective Date	Cancel Date	Paid through Date	Monthly Premium	Monthly Subsidy Amount	Monthly Billed Amount
Pediatric Vision Individual		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
PA Off Exchange HSA		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
DP03 - PEDIATRIC DENTAL		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
IND PPO SILVER HSA OFFX		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Personal Choice PPO Silver Reserve		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

#### Dependent Details

No Dependent Information Available.

## 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

Column	Logic	Value
CID	Equals	<input type="text"/>
Subscriber Name	Contains	<input type="text"/>
Subscriber Phone Number	Equals	<input type="text"/>
Subscriber Email Address	Equals	<input type="text"/>
USI/UMI Number	Equals	<input type="text"/>
Effective Date mm/yyyy	Equals	<input type="text"/>
Status	Equals	<input type="text"/>
Line of Business	Equals	<input type="text"/>

Select a criterion by filling in a value.  
Only **ONE** criterion may be selected at a time.