

## ABC Health Information Architecture v2.1 Notes

### ***Introduction to the ABC Health Information Architecture document and the ABC Health Information Architecture Notes***

The purpose of the *Information Architecture* document is to provide the structural framework for the ABC Health web site. It primarily shows how the web site's content will be grouped and gives some idea of the major pathways within the web site. Note, however, that it is not an exhaustive inventory of all connections between the different content containers.

The *Notes* provide some explanation for the diagrams in the *ABC Health Information Architecture v2.1* document. Approval for the *Information Architecture* document does not necessarily signify approval of the associated *Notes*.

### **Note about Labels**

The labels for the different sections need to be finalized and approved. Proposed labels have been capitalized while interim labels are all lowercase (excepting proper names and acronyms). Collections of pages or files (e.g., articles or PDF files) are also labelled using lowercase letters since the names of the individual elements will differ.

### **Note about Global Elements**

Global elements appear on every page of a designated area. The elements below appear on every page of the publicly accessible areas of the ABC Health web site. Specific details to be determined.

#### **NAVIGATION**

- About ABC Health
- Broker Services
- Careers
- Group Plans
- Health News & Information
- Personal Plans
- Small Office & Home Business Plans

#### **OTHER LINKS**

- Contact Us
- Feedback
- Français
- Help
- Legal/Privacy/Disclaimer
- Personalize (if there is room)
- Search
- Sign In (Plan Member, Plan Admin, TPA, Broker, Provider)
- Site Index

#### **STATIC**

- "Call 1-800-123-4567"
- © 2001 ABC Mutual Group. All rights reserved.
- "ABC Health is a division of ABC Mutual Insurance Company"

### **"Calls to Action"**

Where appropriate, all pages on the web site (both public and restricted) contain a "call to action" message that prompts the user to get more information or apply for coverage. This whether through e-mail, over the phone, via a broker or agent (through the "Agent Locator"), downloading ABC Health literature, requesting ABC Health literature, etc.

## **0.0 Site Overview**

This diagram shows the high-level structure of the ABC Health web site. All major sections are shown.

### **0.0 ABC Health Home Page**

The *ABC Main Page* is an introduction to ABC Health and it's web site. It might contain:

1. a high-power marketing statement/welcome message/intro to ABC Health's web site (a few sentences to a paragraph or two). One phrase to potentially use as a centrepiece might be helpful for the visual design phase.
2. Might want to introduce the "Agent Locator" and "Provider Locator" functions if these will be used often
3. bulletin board/news area for headlines, article titles, surveys, opinion polls, and other "what's new"-type information. (5-7 items, <10 words long if possible)

## **1.0 Personal Plans**

This section contains information on ABC Health's supplementary insurance plans targeted towards individuals. *In Progress.*

## **2.0 Small Office & Home Business Plans**

This section contains information on ABC Health's supplementary insurance plans targeted towards small offices & home businesses. *In Progress.*

### **3.0 Group Plans**

This section contains information on ABC Health's group benefits targeted towards plan administrators and prospective members of group benefits packages.

#### **3.0 Main Page**

The initial page serves as a brief introduction to this section of the web site and ABC Health's group benefits products. There is also information directing visitors from businesses with ten or fewer people to the *Small Office & Home Business Plans* section (2.0). The latter information could go on the *ABC Health Home Page* (0.0) instead.

#### **3.1 Introduction to Group Benefits**

This section provides information related to buying or owning group benefits. (targeted toward both plan administrator prospects and plan member prospects.

Articles might cover the following topics:

- the basics (sponsoring a plan, plan administration primer); may link to FAQ
- managing benefits
- learn about shopping for group benefits
- Industry news & trends (cross-ref to News)
- health & wellness information (cross-ref to News)

#### **3.1 Initial Page**

This page is a gateway to introductory information on group benefits. It might briefly introduce the need for private health insurance and tie in the other articles that this section might hold. Links to individual articles will either be in a list, embedded within the text, or some other configuration depending on what form the content takes. It is geared toward the small office and home business markets.

##### **3.1.1... individual articles**

If written by ABC Health, each article might provide the following additional information:

- specialized terms linked to the glossary; definition comes up in a pop-up window.
- list of some related articles on or off the ABC Health web site
- the usual information directing the reader to the call centre, brokers, or product literature.

#### **3.2 ABC Health Services**

This page primarily serves a marketing function. It outlines the services and features of ABC Health that make the company and its products attractive to potential plan administrators and members. Depending on the amount and type of information, this section may be a single page or it might consist of a number of articles or sections (i.e., 3.2.2...) that are threaded together.

A link to a literature request form is integrated into the content for the page. (Possibly part of the "call to action" in an introductory or concluding blurb.)

##### **3.2.1 Internet demo**

This page introduces the *Internet Demo* and provides a link for the user to follow. If the *Initial Page* (3.2) provides sufficient introduction, the link from the initial page goes directly to the demo.

### **3.3 Product Guides**

This page introduces ABC Health's group products.

The information that goes with each product name might look like the description for HealthPlanOne™ on the "Personal Plans" page of the current web site.

A link to a literature request form is integrated into the content for the page. (Possibly part of a "call to action" in an introductory or concluding blurb.)

#### **3.3.1... Product records**

This page provides a more detailed overview of a product: who it's for and what it does. Specific benefit or coverage information is provided on *benefit details* pages (2.3.1.1....).

#### **3.3.1.b product brochure**

This is a downloadable version of the product brochure. (More than one file may be presented if multiple documents are associated with a product. Organization depends on the types of print documents that will be available for each product.)

#### **3.3.1.1 product overview**

This page provides a more detailed overview of a product: who it's for and what it does. Specific benefit or coverage information is provided on *product feature* pages (2.3.1.2....). A link to a *downloadable product brochure* (2.3.1b) is also provided.

#### **3.3.1.2... product features**

These pages contain more information on individual product features.

#### **3.3.2competitive rate comparisons**

#### **3.3.3Benchmarking information**

### **3.4 Forms**

This section provides claim and other forms for members of Group plans. It might also contain links to *Help* articles that explain what the forms are and how to fill them out.

## **4.0 Broker Services**

This section contains information for brokers who have not yet registered with ABC Health.

### **4.0 Main Page**

The main page introduces this section.

Alternatively, the content for the initial pages of both Consumer and Group brokers could be presented together.

Another alternative is for this page to contain the information that falls within “Selling ABC Health Products” and “Becoming a Recognized Agent or Broker” on the current web site.

### **4.1 consumer/SOHO markets**

This section contains items specifically targeted towards Consumer markets.

#### **4.1 Initial Page**

The initial page introduces this section.

##### **4.1.1 broker services & ABC Health information (for consumer brokers)**

This page contains an overview of what ABC Health does specifically for Consumer brokers. If necessary, the information might be separated into sections (4.1.1.1...).

One section might provide an overview of ABC Health’s secure Broker Account functions.

If the information for Consumer and Group brokers is similar, this section & *4.2.1 broker services and ABC Health information (for group brokers)* can be consolidated with only the *Product Guides* (4.1.2 and 4.2.2) being separated.

##### **4.1.2 Product Guides (consumer)**

This section contains information on ABC Health’s Consumer products & services. This material may be targeted specifically for brokers, or it might merely pull the appropriate product information from other sections within the web site. The structure mirrors *1.3 Our Plans of Personal Plans*.

### **4.2 group markets**

This section contains items specifically targeted towards Group markets.

#### **4.2 Initial Page**

The initial page introduces this section.

##### **4.2.1 broker services & ABC Health information (for group brokers)**

This page contains an overview of what ABC Health does specifically for Group brokers. If necessary, the information might be separated into sections (4.2.1.1...).

One section might provide an overview of ABC Health’s secure Broker Account functions.

If the information for Consumer and Group brokers is similar, this section & *4.2.1 broker services and ABC Health information (for group brokers)* can be consolidated with only the *Product Guides* (4.1.2 and 4.2.2) being separated.

#### **4.2.2 Product Guides (group)**

This section contains information on ABC Health's Group products & services. This material may be targeted specifically for brokers, or it might merely pull the appropriate product information from other sections within the web site. The structure mirrors 3.3 *Our Plans* of *Group Plans*.

#### **4.3 become a recognized broker**

This section contains information on selling ABC Health products and becoming a recognized broker if it does not appear on the *main page* (4.0). If online registering is possible for brokers, this is one of the entry points for it.

## **5.0 Providers**

This section contains information for providers who have not yet registered with ABC Health.

### **5.0 Main Page**

The main page introduces this section.

### **5.1 benefits of working with ABC Health**

Depending on the amount and type of information, this section may be a single page or it might consist of a number of articles or sections that are threaded together.

Alternatively, maybe there is no discrete “*benefits of working with ABC Health*” section. Instead, an introduction to the benefits of working with ABC Health might be on the *Provider main page* (5.1)

### **5.2 working with ABC Health**

This section covers topics such as:

- EDI standards supported
- payment schedules
- procedures

#### **5.2.1 individual topic pages**

### **5.3 Product Guides**

The first page (5.3) would likely consist of a brief introduction to ABC Health’s range of products. There might then be links from there to overviews of specific products (5.3.x) and then detailed product information (5.3.x.1...). (The structure of this section ultimately depends on how the information will be presented. )

### **5.4 Become a Preferred Provider**

This section contains information on becoming a Preferred Provider. It also contains an online registration function.

## **6.0 Health News & Information**

This section contains health-related news and information.

### **6.0 Main Page**

The *Health News & Information Main Page* presents some of the most recent headlines from *Health News*, *Wellness Information*, *Health Care Trends & Research*. Feature articles from *Newsletters* are also announced.

### **6.1 Health News**

Collection of recent health news items.

#### **6.1 Initial Page**

Complete listing of recent health news.

##### **6.1.1.1... individual articles**

If written by ABC Health, each article might provide the following additional information:

- specialized terms linked to the glossary; definition comes up in a pop-up window.
- list of some related articles on or off the ABC Health web site
- the usual information directing the reader to the call centre, brokers, or product literature.

### **6.2 Wellness Information**

Collection of articles dealing with personal wellness and health. Final organization of section depends on number and type of articles expected.

This section could contain a link to the information on buying health insurance contained in sections 1.1 & 2.1 (*learn about health insurance* for individuals and SOHOs, respectively), and 3.1 (*learn about group benefits*).

#### **6.2 Initial Page**

May showcase the most recent articles with a list of all articles.

##### **6.2.1.1... individual articles**

If written by ABC Health, each article might provide the following additional information:

- specialized terms linked to the glossary; definition comes up in a pop-up window.
- list of some related articles on or off the ABC Health web site
- the usual information directing the reader to the call centre, brokers, or product literature.

### **6.3 Health Care Trends & Research**

Collection of articles dealing with trends and research with related links. Final organization of section depends on number and type of articles expected.

#### **6.3 Initial Page**

May showcase the most recent articles with a list of all articles.

### **6.3.1.1... individual articles**

If written by ABC Health, each article might provide the following additional information:

- specialized terms linked to the glossary; definition comes up in a pop-up window.
- list of some related articles on or off the ABC Health web site
- the usual information directing the reader to the call centre, brokers, or product literature.

## **6.4 Regulations**

Information on government regulations with associated links.

### **6.4 Initial Page**

May showcase the most recent articles with a list of all articles.

### **6.4.1.1... individual articles**

If written by ABC Health, each article might provide the following additional information:

- specialized terms linked to the glossary; definition comes up in a pop-up window.
- list of some related articles on or off the ABC Health web site
- the usual information directing the reader to the call centre, brokers, or product literature.

## **6.5 Newsletters**

This section holds ABC Health's newsletters.

### **6.5 Initial Page**

One page that provides a brief description of the two ABC Health newsletters.

### **6.5.1 ABCLine**

Shows a summary of the contents for the most recent issue of *ABCLine*. If there is an online version of the newsletter, this will serve a function similar to the front page of a newspaper. A link to a PDF version of the newsletter is also available.

#### *6.5.1.1.1 ... individual ABCLine newsletter articles*

Online versions of ABCLine newsletter articles.

#### *6.5.1.2 ABCLine Archive*

List of past issues of *ABCLine* with each entry showing a table of contents for that issue.

If an online version of the newsletter is planned, the newsletter entry would link to the online version of the newsletter with the table of contents linking to individual articles. A separate link to a PDF version would be provided. If there are no future plans for an online version of the newsletter, the newsletter entry will link directly to a PDF version of the newsletter.

#### *6.5.1.3.1 ... individual ABCLine newsletters (downloadable)*

Individual PDF versions of issues of ABCLine.

## **6.5.2 ABC Report**

Shows a summary of the contents for the most recent issue of the *ABC Report*. If there is an online version of the newsletter, this will serve a function similar to the front page of a newspaper. A link to a PDF version of the newsletter is also available.

### *6.5.2.1.1 ... individual ABC Report newsletter articles*

Online versions of ABC Report newsletter articles.

### *6.5.2.2 ABC Report Archive*

List of past issues of the ABC Report with each entry showing a table of contents for that issue.

If an online version of the newsletter is planned, the newsletter entry would link to the online version of the newsletter with the table of contents linking to individual articles. A separate link to a PDF version would be provided. If there are no future plans for an online version of the newsletter, the newsletter entry will link directly to a PDF version of the newsletter.

### *6.5.2.3.1 ... individual ABC Report newsletters (downloadable)*

Individual PDF versions of issues of the ABC Report.

## **6.5.3 subscriptions**

The visitor can subscribe/unsubscribe to ABC Health press releases, newsletters, and e-mail campaigns. Defaults to *6.5.3.1 subscribe*.

### *6.5.3.1 subscribe*

The visitor enters their e-mail address and selects the items they want to subscribe to. Lists all ABC Health electronic publications that the visitor can subscribe to.

### *6.5.3.2 unsubscribe*

The visitor enters their e-mail address and selects the items they want to unsubscribe from. Lists all ABC Health electronic publications that the visitor can unsubscribe from.

## **6.6 panel of experts**

Questions to a panel of experts similar to Ontario government telenurse program, but not real-time. Can also be a case study that is updated monthly.

### **6.6 Initial Page**

Current panel of experts article.

If written by ABC Health, each article might provide the following additional information:

- specialized terms linked to the glossary; definition comes up in a pop-up window.
- list of some related articles on or off the ABC Health web site
- the usual information directing the reader to the call centre, brokers, or product literature.

### **6.6.1 panel of experts archive**

List of past panel of experts features sorted by date, most recent first.

#### **6.6.1.1... individual panel of experts features**

Individual features.

## **6.6 drug interactions**

Interactive tool to check drug interactions.

## **6.7 Online Resources**

A collection of online resources. Depending on the number of links, this section may be one page or many pages threaded together.

*Possible functionality:* Upon entering *6.7 Online Resources*, the visitor will be sent the information/page most closely related to the section they were previously in.

### **6.7 Initial Page**

Possibly an introduction to the sections within *6.7 Online Resources*.

#### **6.7.1 Health News**

Collection of web-based health news resources. Categorized by topic.

#### **6.7.2 Wellness Information**

Collection of web-based personal health and wellness resources. Categorized by topic.

#### **6.7.3 Health Care Trends & Research**

Collection of web-based “health care trends and research” resources. Categorized by topic.

#### **6.7.4 Regulations**

Collection of web-based regulation resources. Categorized by topic.

#### **6.7.5 Other Health Sites**

Collection of other web-based health resources that do not fit within the four previous categories.

## **7.0 About ABC Health**

This section provides visitors with information about ABC Health.

### **7.0 Main Page**

The main page offers a brief introduction about who ABC Health is and what ABC Health does, and presents the visitor with recent news from and about ABC Health.

## **7.1 Corporate Overview**

This section provides more specific information about ABC Health's history and structure.

### **7.1 Initial Page**

The initial page iterates ABC Health's mission and value statements, and provides some background on the company (similar to the information under "Experience" in the *Financial Information* section on the current web site).

#### **7.1.1 ABC Mutual Group**

Information on ABC Mutual Group with links to ABC Mutual and its subsidiaries.

#### **7.1.2 management team**

Information about ABC Health's management team. Specific content & organization to be determined.

#### **7.1.3 financial information**

Information about ABC Health's financials and ratings.

#### **7.1.4 confidentiality guidelines**

Information about ABC Health's confidentiality guidelines.

## **7.2 ABC News**

This section contains ABC Health's press releases and newsletters.

### **7.2 Initial Page**

The initial page presents headlines from the most recent press releases and newsletter features.

#### **7.2.1 Press Releases**

An archive of ABC Health press releases. The default view shows the ten most recent releases with the most recent at the top. Additional press releases may be shown by clicking on a "more press releases" link. The list of releases can also be filtered by date allowing the user to view press releases from a chosen time period. Specific details depend on the volume of press releases generated during a typical year.

##### *7.2.1.1 ... individual press releases*

The individual press releases.

##### *7.2.1.1b ... individual press releases (downloadable)*

Individual press releases prepared for downloading.

#### **7.2.4 ABC Research**

An archive of ABC research papers. The default view shows the ten most recent papers with the most recent at the top. Additional papers may be shown by clicking on a “more papers” link. Alternatively, the papers may be organized by topic. Details to be determined.

##### *7.2.4.1 ... individual research papers*

The individual research papers.

##### *7.2.4.1b... individual research papers (downloadable)*

Individual research papers prepared for downloading.

#### **7.3 community involvement**

This section provides information about ABC Health’s community initiatives and sponsorships.

#### **7.4 Careers**

Provides information on working at ABC Health.

##### **7.4 Initial Page**

The initial page is an introduction to working at ABC Health.

##### **7.4.1 job postings**

List of job postings. May be sorted by location and/or job type. Execution may depend on number of job postings expected.

##### *7.4.1.1 ... individual job descriptions*

Content to be determined.

##### **7.4.2 career paths**

Information on some of the career paths available at ABC Health.

##### **7.4.3 how we work**

Information on ABC Health’s culture.

##### **7.4.4 submit resumé**

Provides a form for the visitor to submit their resumé.

##### **7.4.5 job mailing list**

The visitor enters their e-mail address and chooses to subscribe to or unsubscribe from ABC Health’s job mailing list.

#### **7.4.6 CareerXact**

Information on ABC Health's partnership with CareerXact. Includes a link to the CareerXact web site. If the introduction to CareerXact occurs on the *initial page* (7.2), this links directly to the CareerXact web site.

### **7.5 Contact Us**

Contact information for ABC Health. Specific content and organization to be determined.

#### **7.5 Initial Page**

Provides general contact information for ABC Health. For more directed inquiries, visitors are directed to the appropriate section.

#### **7.5.1 Directory**

Directory of ABC Health personnel so people can get back to the person they were speaking with. Provides e-mail and phone number. Organization and functionality to be determined.

#### **7.5.2 Agent Locator**

Locate an office location by proximity to an entered postal code. Listings are also browsable by region/city.

#### **7.5.3 ABC Health Offices**

Directory of ABC Health Offices. When an online map is available, a "map" link is presented with the office entry. Organized by region/city.

#### **7.5.4 comments/feedback**

Online form for comments/feedback.

#### **7.5.5 Customer Survey**

Online marketing survey.

## **10.0 Plan Member Account**

This section enables plan members to monitor and manage their own health insurance plans. It also allows ABC Health to push specific information to the member.

### **Notes**

- Fee schedules need to be placed in the proper section
- Conversion – member is notified if they or a dependent becomes eligible to convert from group to consumer or if a dependent reaches an age where they are no longer covered under the member’s plan. Notification is sent out via e-mail and an alert appears in the appropriate spot in the plan member’s account (e.g., Alert appears on the member’s account main page and the dependant’s name is flagged. The alert and ”flag” link to an explanatory message that can contain links to information relevant to converting. This system can also be used for other types of notices.)

### **10.0 Main Page**

- shows the member what plans they have with ABC Health (provides member with plan names and policy numbers)
- potentially presents specific articles that are relevant to the member
- may also solicit Feedback and present participatory marketing surveys

## **10.1 Plan Summary**

This section contains information that deals with the plan itself.

### **10.1 Initial Page**

The initial page presents a list of benefits, showing coverage maximums, claims paid to member, and credits/coverage remaining for each benefit. (“Account balance”-like information.)

A list of dependants is also presented under the heading, “Coordination of Benefits.”

#### **10.1.1 Flexible Benefits (group plan members only)**

Members can allocate credits amongst their benefits via SHPS.

##### *10.1.2.1 ... details of individual benefits*

Benefit names from the *initial page* (10.1.0) bring up detailed information on that benefit. This information mirrors the information (explanation of benefits) in the booklets/policy: benefit definitions, coverage maximums, coordination of benefits, and formulary information. Where appropriate, reference may be made to the member’s provincial health plan coverage (cross-referenced with section in Help).

#### **10.1.3 Booklets**

Collection of plan documentation for the member’s benefits/plans that is not covered in pages *10.1.2.1 ... details of individual benefits*. Organization to be determined.

##### *10.1.3.1 ... individual booklets*

Online versions of booklets.

#### **10.1.4 Coordination of Benefits**

Information on spouse’s or dependant’s coverage under the member’s benefits.

### **10.1.5 Change Coverage**

Member can add dependants, ...

*For Group Members:* A notification of changes in relevant information is sent to a plan administrator or TPA. Details to be determined.

## **10.2 Claims**

Members can look up specific Explanation of Benefits (EOBs) & direct deposit history from this section. Message codes in the EOB are linked to their definitions within *10.9 Help*. Execution details of these functions to be determined.

The initial page defaults to *10.2.1 Claim Status*.

### **10.2.1 Claim Status**

Status of claims (e.g., held (not submitted), submitted (in processing), most recently processed claims).

### **10.2.2 Submit Claim**

Submit a claim to ABC Health for processing. Member can choose to preview (simulate), hold, or submit a claim once the information has been entered.

## **10.3 Transaction History**

Record of the member's most recent transactions (e.g., payments received, claims being processed, claims being held, coverage changes).

Default display lists all transactions, sorted by date with the most recent ones appearing first.

Transactions can be filtered and sorted by time period and type of transaction.

## **10.4 Session Summary**

A one page summary of actions that the member has performed during this login. May link to pages that provide more detailed information on the member's actions.

## 10.5 Personal Information

*For Group Members:* Notification of changes in relevant information is sent to a plan administrator or TPA. Details to be determined.

### 10.5 Initial Page

#### *Identification*

- IDs (not editable)
- Password
- Name

#### *Contact Information*

- address
- phone numbers
- e-mail

### 10.5.1 Banking Information

- banking Information. Specific content to be determined.

### 10.5.2 Subscriptions

4. subscriptions to press releases, newsletters, e-mail campaigns, and print mailings

### 10.5.3 Personalization

- member can select the types of information that appear on the *initial page* (10.7.0) of the *Resource Centre*. They can also make some choices as to what information appears on their account *Main Page* (10.0.0)

## 10.6 Personal Medical Log

Plan members can use this section to keep a record of drugs (when they were taken, dosages), hospital visits, clinic visits, immunizations (when taken, when boosters are required), etc.

The initial page defaults to *10.6.1 View Log*.

### 10.6.1 View Log

Members can choose to filter and sort entries by category and date.

### 10.6.2 Update Log

Members can add, modify, or delete entries from this section. Defaults to showing all entries chronologically, starting with most recent.

## **10.7 Resource Centre**

This section contains additional information and tools that are not directly involved with account monitoring or administration.

### **10.7 Initial Page**

This page could push specific information contained within the Resource Centre to members.

#### **10.7.1 Health Information**

(Purchased from a third party such as Ceridian)

#### **10.7.2 Forms**

Collection of forms that plan members can download, print, complete, and mail in.

## **10.8 Search**

Members can conduct keyword searches on the pages in their member account. This can help them find specific drug or benefit information, glossary definitions, articles, procedures, and log entries.

## **10.9 Contact Us**

Specific “contact us” information for plan members. Can deliver different information for Group customers and Consumer customers if necessary. Includes options for IRQ or VoIP.

## **10.10 Help**

All items cross-link where ever it is appropriate in this section.

5. Getting Started (Tour)
  - Tour
  - managing flexible benefits
  - guide to filing claims (possibly cross-referenced to Claims; similar to articles below)
  - articles explaining the various forms (possibly cross-referenced to Forms; similar to guide above)
6. Government vs. Private Insurance
7. Coordination of Benefits
8. Convert from Group to Consumer
9. Glossary including the message codes from Explanation of Benefits (cross-referenced to where ever a particular term appears)
10. Policies & procedures
11. Security
12. Confidentiality
13. other FAQs...

## **11.0 Plan Administrator Account**

This section enables plan administrators to monitor and manage the group benefits for their company or organization.

### **11.0 Main Page**

Presents information that the plan administrator will want to see immediately upon entering their account. For example:

- alerts that plan members have made certain changes to their accounts
- specific articles that are relevant to them (determined by their preferences entered in Personal Information)
- may also solicit Feedback and present participatory marketing surveys

### **11.1 Benefit Information**

Not sure about this.

Information on the benefits package that the plan administrator's business or organization has.

#### **11.1 Initial Page**

Overview of the benefits package. Benefit names link to more detailed information (11.1.1...). These names form the local navigation for *11.1 Benefit Information*.

##### **11.1.1 group benefits package details**

More detailed information on specific benefits. Link from the benefit names on the *initial page* (11.1).

### **11.2 Membership Management**

Not sure about this.

This section enables the administrator to change members' enrolment information.

#### **11.2 Initial Page**

Defaults to *11.2.1 Search Member List*.

May also show the status of coverage changes and/or provide a list of alerts for changes made by plan members to their contact/banking/coverage information.

If necessary, this page might contain an introduction to this section.

##### **11.2.1 Search Member List**

From here, the plan administrator can search for a particular member using certain criteria (to be determined). (e.g., name, subscriber ID). Search should function like the author search on Amazon.com. The search results page would function similar to *11.2.2 Browse Member List*.

###### *11.2.1.1 Search Results*

Lists the results of the administrator's query with the closest matches appearing first.

The list can then be browsed, sorted, or filtered. (see *11.2.2 Browse Member List*)

### 11.2.2 Browse Member List

From here, the plan administrator can browse the member list.

A certain number of entries are displayed per page with links to previous/next pages. The default display lists abbreviated member entries alphabetically by last name (to be confirmed). The administrator may also jump to a particular letter of the alphabet.

The list can be sorted and/or filtered by certain criteria (e.g., letters/numbers in first name, last name, subscriber ID). To be determined.

#### 11.2.3.1... individual member entries

1. Identification Information (subscriber ID, name)
2. Contact Information (address, phone numbers, e-mail)
3. EOB delivery mechanism (mail, e-mail, fax,...)
4. Beneficiary
5. Banking information

### 11.3 coverage management

*In Progress*

Allows the plan administrator to review and modify coverages, and check the status of coverage changes (for individual members)

If this is to be done for individual members, this entire section should be moved to the *member entry* pages (11.2.3.1...) with the exception of *11.3.3 Status of Coverage Changes* which would become one of the primary options under *11.2 Member Management*.

#### 11.3 Initial Page

Depends on where this section ends up.

If it remains a discrete section off of the *Main Page* (11.0), it might display the most recently processed coverage changes.

If it branches off the *member entry* pages (11.2.3.1...), it would default to *11.3.1 Current Coverage*.

#### 11.3.1 Current Coverage

Summary of current coverage.

#### 11.3.2 Add/Modify/Delete Coverages

Depends on where this section ends up.

If it branches off the *member entry* pages (11.2.3.1...), it would present forms to facilitate modification of coverages.

#### 11.3.3 Status of Coverage Changes

List of coverage changes & where they are in processing. List can be filtered and sorted by specified criteria (e.g., processing stage, subscriber number, or last name of applicant). To be determined. Individual entries might link to more detailed information about the change.

#### **11.4 billing**

Not sure about this.

- administrator able to review bills, make changes, and resubmit to ABC Health

#### **11.4 Initial Page**

##### **11.4.1 Submit a Bill**

##### **11.4.2 bill schedules**

##### **11.4.3 financial summary history**

#### **11.5 Reports**

Collection of reports. Organization dependent on content.

Some examples might be:

- Claims summary analysis by:
  - dollar band
  - benefit type
  - group/division
- Claims by certificate listing

#### **11.6 maintenance issues/work completed**

- refers to the work that ABC Health has done for the administrator in the month. (i.e., number of plan changes complete, customized statistics, enrolment changes, call centre numbers)

This might better fall within *11.5 Reports*.

#### **11.7 Session Summary**

Summary of actions that the administrator has performed during this login.

#### **11.8 Registration Information**

This section contains information pertaining to the plan administrator and registration of their account.

##### **11.8 Initial Page**

###### *Identification*

- IDs (not editable)
- Password
- Name

###### *Contact Information*

- address
- phone numbers
- e-mail

### **11.8.1 Banking Information**

- Banking Information. Specific content to be determined.

### **11.8.2 Subscriptions**

- subscriptions to press releases, newsletters, e-mail campaigns, and print mailings.

### **11.8.3 Personalization**

- plan administrator can select the types of information that appear on the *initial page* of the *Resource Centre* (11.9). They can also make some choices as to what information appears on their account *Main Page* (11.0)

## **11.9 Resource Centre**

This section contains additional information and tools that are not directly involved with benefits monitoring or administration.

### **11.9 Initial Page**

This page displays a selection of the most recent sales tips, presentations, competitive analyses, and trend & research information. Specific content to be determined.

### **11.9.1 Product Guides**

This is a quick reference for all of ABC Health's group products and services. It contains product and service overviews & details. It may be identical to the *Product Guide* (4.2.2) in the *Broker Centre*.

### **11.9.2 Forms & Literature**

This is a collection of forms, booklets, and contracts that are available to be downloaded.

### **11.9.3 Standard Operating Procedures**

ABC Health's SOPs

## **11.10 Search**

Administrators can conduct keyword searches on the pages in their account area. This can help them find specific plan/benefit information, members, glossary definitions, articles, procedures, etc.

## **11.11 Contact Us**

Specific "contact us" information for plan administrators. Other *Contact Us* options could be accessible from here.

## **11.12 Help**

All items cross-link where ever it is appropriate in this section.

14. Getting Started
15. Glossary including the message codes from Explanation of Benefits (cross-referenced to where ever a particular term appears)
16. Policies & procedures
17. Security
18. Confidentiality
19. other FAQs...

## **12.0 Third Party Administrator Account**

This section enables third party administrators to monitor and manage the group benefits for a number of companies or organizations.

### **11.0 Main Page**

Presents information that the plan administrator will want to see immediately upon entering their account. For example:

- alerts
- specific articles that are relevant to them (determined by their preferences entered in Personal Information)
- may also solicit Feedback and present participatory marketing surveys

### **12.1 Client Management**

Not sure about this.

This section enables the TPA to change manage clients' group benefits.

#### **12.1 Initial Page**

Defaults to *12.1.1 Search Client List*.

May also show the status of coverage changes and/or provide a list of alerts for changes made by plan members to their contact/banking/coverage information.

If necessary, this page might contain an introduction to this section.

#### **12.1.1 Search Client List**

From here, the TPA can search for a particular client using certain criteria (to be determined). (e.g., name, ID). Search should function like the author search on Amazon.com. The search results page would function similar to *12.1.2 Browse Client List*.

##### **12.1.1.1 Search Results**

Lists the results of the TPA's query with the closest matches appearing first.

The list can then be browsed, sorted, or filtered. (see *12.1.2 Browse Client List*)

#### **12.1.2 Browse Client List**

From here, the TPA can browse their client list.

A certain number of entries are displayed per page with links to previous/next pages. The default display lists abbreviated client entries alphabetically by name (to be confirmed). The TPA may also jump to a particular letter of the alphabet.

The list can be sorted and/or filtered by certain criteria (e.g., letters/numbers in name, ID). To be determined.

### 12.1.3 individual client account

Within this section the TPA can monitor and manage a specific group's benefits.

#### 12.1.3.1 client registration information

6. Identification Information (ID, name)
7. Contact Information (name, address, phone numbers, e-mail)
8. EOB delivery mechanism (mail, e-mail, fax,...)
9. Banking information

#### 12.1.3.2 benefit information

Information on the client's benefits package. Structure & functionality mirrors *Benefit Information* (11.1) in the *Plan Administrator Account*.

#### 12.1.3.3 Member Management

This section enables the TPA to change their client's members' enrolment information. Structure & functionality mirrors *Member Management* (11.2) in the *Plan Administrator Account*.

#### 12.1.3.4 coverage management

Allows the TPA to review and modify coverages, and check the status of coverage changes. Structure & functionality mirrors *coverage management* (11.3) in the *Plan Administrator Account*.

#### 12.1.3.5 billing

- TPA able to review bills, make changes, and resubmit to ABC Health

Structure & functionality mirrors *billing* (11.4) in the *Plan Administrator Account*.

#### 12.1.3.6 Reports

Collection of reports (including financial reports). Organization dependent on content. Structure & functionality mirrors *Reports* (11.5) in the *Plan Administrator Account*.

#### 12.1.3.7 maintenance issues/work completed

- refers to the work that ABC Health has done for the TPA in the month. (i.e., number of plan changes complete, customized statistics, enrolment changes, call centre numbers)

Structure & functionality mirrors *maintenance issues/work completed* (11.6) in the *Plan Administrator Account*.

## 12.3 Reports

Collection of reports. Organization dependent on content.

Some examples might be:

- Claims summary analysis by:
  - dollar band
  - benefit type
  - group/division
- Claims by certificate listing

#### **12.4 maintenance issues/work completed**

- refers to the work that ABC Health has done for the TPA in the month. (i.e., number of plan changes complete, customized statistics, enrolment changes, call centre numbers). Organized by client. TPA can search, browse or filter items.

This might better fall within *12.3 Reports*.

#### **12.5 Session Summary**

Summary of actions that the TPA has performed during this login.

#### **12.6 Registration Information**

This section contains information pertaining to the TPA and registration of their account.

##### **12.6 Initial Page**

###### *Identification*

- IDs (not editable)
- Password
- Name

###### *Contact Information*

- address
- phone numbers
- e-mail

##### **12.6.1 Banking Information**

- Banking Information. Specific content to be determined.

##### **12.6.2 Subscriptions**

- subscriptions to press releases, newsletters, e-mail campaigns, and print mailings.

##### **12.6.3 Personalization**

- TPA can select the types of information that appear on the *initial page* of the *Resource Centre* (12.7). They can also make some choices as to what information appears on their account *Main Page* (12.0)

## **12.7 Resource Centre**

This section contains additional information and tools that are not directly involved with benefits monitoring or administration.

### **12.7 Initial Page**

This page displays a selection of the most recent sales tips, presentations, competitive analyses, and trend & research information. Specific content to be determined.

#### **12.7.1 Product Guides**

This is a quick reference for all of ABC Health's group products and services. It contains product and service overviews & details. It may be identical to the *Product Guide (4.2.2)* in the *Broker Centre*.

#### **12.7.2 Forms & Literature**

This is a collection of forms, booklets, and contracts that are available to be downloaded.

#### **12.7.3 Standard Operating Procedures**

ABC Health's SOPs

## **12.8 Search**

TPAs can conduct keyword searches on the pages in their account area. This can help them find specific plan/benefit information, clients, members, glossary definitions, articles, procedures, etc.

## **12.9 Contact Us**

Specific "contact us" information for plan administrators. Other *Contact Us* options could be accessible from here.

## **12.10 Help**

All items cross-link where ever it is appropriate in this section.

20. Getting Started
21. Glossary including the message codes from Explanation of Benefits (cross-referenced to where ever a particular term appears)
22. Policies & procedures
23. Security
24. Confidentiality
25. other FAQs...

### **13.0 Broker Account**

This section enables brokers to monitor and manage their business with ABC Health and their ABC Health customers. Differences between Consumer and Group brokers need to be resolved.

#### **13.0 Broker Main Page**

Presents information that the broker will want to see immediately upon entering their account. For example:

- specific articles that are relevant to them (determined by their preferences entered in Personal Information)
- may also solicit Feedback and present participatory marketing surveys

#### **13.1 Commission Statements**

- record of payments received from ABC Health

##### **13.1.1 Commission Status**

- pending payments from ABC Health

#### **13.2 compensation schedules**

- schedule for payments, commission structure

#### **13.3 instant quote (11–50 members)**

Group brokers can generate a quotation for a group with between 11 and 50 members. Process to be developed.

#### **13.4 Applications**

This section contains everything that deals with applications except for commissions.

##### **13.4 Initial Page**

Displays the applications that have most recently been processed by ABC Health.

##### **13.4.1 Submit Application**

Fill out and submit an application for a client. Process to be developed.

##### **13.4.2 Application Status**

List of applications & where they are in processing. List can be filtered and sorted by processing stage, application number, or last name of applicant. Broker can also search for a specific application.

#### **13.5 Client Records**

Not sure about this.

This section contains information about the broker's clients.

##### **13.5.1 Client Renewals Timeline**

Schedule of when clients' policies are up for renewal.

### 13.5.2.1... individual client records

Record of a client's contact information, plan type, plan renewal date (captured from application process). Details to be confirmed/specified.

## 13.6 Reports

This section contains financial reports and Internet reports (e.g., quote activity). Specific reports to be offered to be decided. [structure of this section will depend on the reports to be offered]

### 13.6.1 CSBM Site Reports (only if subscribed for this service)

- activity summaries of broker's CSBM site

## 13.7 Session Summary

Summary of actions that the broker has performed during this login.

## 13.8 Registration Information

This section contains information pertaining to the broker and registration of their account.

### 13.8 Initial Page

#### *Identification*

- IDs (not editable)
- Password
- Name (for use by ABC Health, in the *Agent Locator*, and on the CSBM Broker Site (if applicable))

#### *Contact Information*

(for use by ABC Health, in the *Agent Locator*, and on the CSBM Broker Site (if applicable))

- address
- phone numbers
- e-mail
- web site

#### *CSBM Broker Site Administration* (only if broker has subscribed for this service)

- CSBM Broker Site Sign In ID and Password
- URL for broker's web site (if different from the one entered on 13.8)
- contact information (for use on CSBM Broker Site) if different from that entered above)

### 13.8.1 Banking Information

- Banking Information. Specific content to be determined.

### 13.8.2 Subscriptions

- subscriptions to press releases, newsletters, e-mail campaigns, and print mailings.

### 13.8.3 Personalization

- broker can select the types of information that appear on the *initial page* of the *Resource Centre* (13.9). They can also make some choices as to what information appears on their account *Main Page* (13.0)

## 13.9 Resource Centre

This section contains additional information and tools that are not directly involved with account monitoring or administration.

### 13.9 Initial Page

This page displays a selection of the most recent sales tips, presentations, competitive analyses, and trend & research information. Specific content to be determined.

### **13.9.1 Product Guides**

This is a quick reference for ABC Health's range of products and services. It contains product and service overviews & details. It may be identical to the *Product Guides* (4.1.2 or 4.2.2) in the *Broker Centre* (4.0)

### **13.9.2 Sales Tips**

This is a collection of sales tips. If there are a large number of them, they are grouped into categories.

### **13.9.3 Sales Presentations**

This is a collection of sales presentations. If there are a large number of them, they are grouped into categories. The presentations are available for download.

### **13.9.4 Competitive Analyses**

This is a collection of competitive analyses. If there are a large number of them, they are grouped into categories. The analyses are available for download.

### **13.9.5 Trends & Research**

This is a collection of articles dealing with industry trends and research. If there are a large number of them, they are grouped into categories

### **13.9.6 Forms, Booklets, and Contracts**

This is a collection of forms, booklets, and contracts that are available to be downloaded. Brokers can also link to a literature order form (for multiple copies) from here.

### **13.9.7 Standard Operating Procedures**

ABC Health's SOPs

### **13.10 Search**

Brokers can conduct keyword searches on the pages in their account area. This can help them find specific plan/benefit information, clients, glossary definitions, articles, procedures, etc.

### **13.11 Contact Us**

Specific "contact us" information for plan administrators. Other *Contact Us* options could be accessible from here.

### **13.12 Help**

All items cross-link where ever it is appropriate in this section.

26. Getting Started
27. Glossary including the message codes from Explanation of Benefits (cross-referenced to where ever a particular term appears)
28. Policies & procedures
29. Security
30. Confidentiality
31. other FAQs...

## **14.0 Provider Account**

This section enables providers to monitor and manage their billing relationship with ABC Health.

### **14.0 Main Page**

- shows the member what plans they have with ABC Health (provides member with plan names and policy numbers)
- potentially presents specific articles that are relevant to the member
- may also solicit Feedback and present participatory marketing surveys

### **14.1 Registration Information**

- Password & Provider type
- Contact Information (for ABC Health and for use in the *Provider Locator*)
- Banking Information
- Subscriptions (press releases, newsletters, e-mail campaigns)

### **14.2 claim inquiry**

- *In Progress*

### **14.3 EFT payments**

Everything to do with EFTs occurs here:

32. submit electronic bills to ABC Health
33. possibly, see the status of their bills (payments outstanding)

### **14.4 Transaction History**

Record of the provider's most recent transactions (e.g., bills submitted but not yet paid, payments received from ABC Health, payments made to ABC Health). Default display lists all transactions, sorted by date with the most recent ones appearing first. Also able to look up past transactions.

Transactions can be filtered and sorted by time period and type of transaction.

### **14.5 Session Summary**

Summary of actions that the provider has performed during this login.

### **14.6 Resource Centre**

This section contains additional information and tools that are not directly involved with account monitoring or administration.

#### **14.6.1 Training Materials**

Collection of training materials for providers. Online/downloadable

#### **14.6.2 Standard Operating Procedures**

ABC Health's SOPs that are relevant to providers

#### **14.6.3 Brochures**

An online form where providers can order multiple copies of ABC Health's product brochures.

#### **14.7 Contact Us**

Specific “contact us” information for providers.

#### **14.8 Help**

FAQs for providers (e.g., help for using the various account functions). If there are a large number of them, they might be grouped into categories.

### **15.0 CSMB Broker Site**

ABC Health's Broker Account page has administrative functions for this site (i.e., broker's web site URL and contact us information plus password & login ID changes). These functions are found in *13.8 Registration Information*.

### **15.7 Sign Out**

Returns users to the broker's web site.

### **15.8 Contact Us**

Broker's contact information is presented to the user based on entries in the broker's own *Registration Information* (13.8)