

4-66496 myClaims Manager Enhancements – Consumer Enablement

Project Specific User Interface Design Document

Revision History

Date	Notes	
6/23/2014	First draft	
6/30/2014	Simple View - View toggle should be visually separated where it will remember the advance/simple view last session and include 'Provider' toggle Advance View - Move 'Provider' toggle to different location Financial Graph tab - Pie chart need 508 compliance	
7/20/2014	Claims Summary: 'View' and 'Provider' pulldowns location moved Redesigned Left nav for Advance view Move hover over to the left for 'You May Owe' column Move the carrot to below the column headers	
7/24/2014	View Advanced View should be a link toggle Financial tab - if there is no Your Responsibility, the big pie chart will only 3 sections without the small pie charts and true for others too Remove 'Claims Types' option Be able to view CSV on screen first	
7/27/2014	Move Paid hover on You May Owe' to Processed item In Process for 'You May Owe' should be blank and no hovers Remove Lab corp line item Left nav hover for Advanced View should be full list Financial tab - Your Responsibility is suppressed, then small pie charts gone 'Generate Report' should be in a pop-up and remove the aqua columns Remove acronyms from spreadsheet Reports tab - Title should be 'Out of Pocket and Deductible Report' Change tabs and title to singular Financial Graph and Report Provide calendar icons	
7/29/2014	Carrot down icon provided Advanced view – Columns updated to Date Visited and Status Claim Types pulldown should just be 'All'	
7/30/2014	Transaction ID for "Not Marked as Paid" added Updated Summary tables 'Patient Responsibility' to 'Your Responsibility'	
7/31/2014	Detailed report to show only two date search criteria - Current plan year and Previous (or Prior) plan year	
8/7/2014	Label changes from "Date" to "Date(s)" Column labels for the new terms match myuhc: <ul style="list-style-type: none"> • Billed Amount —> Amount Billed 	

	<ul style="list-style-type: none"> • Paid by Plan —> Your Plan Paid • Network Discount —> Plan Discount • Applied to Deductible is ok • Patient Responsibility —> Your Responsibility <p>Added Glossary terms for Claims Summary columns –‘Amount Billed’, ‘Your Responsibility’, ‘Plan Discount, ‘Your plan paid’ and ‘Applied Deductible’</p>	
8/8/2014	<p>Claims summary tables - Reflect the sort arrow to bottom right</p> <p>Added Glossary icon to ‘Status’ and ‘You May Owe’</p> <p>Moved the glossary icon to next line on the Summary column title</p> <p>Use existing production glossary definition for “amount billed”, “paid by plan”, “deductible” and “your responsibility” in detail screen</p> <p>Verbiage “Switch to Simple View” shortened to “Simple View”</p> <p>Verbiage “Sort by Provider:” shortened to “Provider”</p>	
8/12/2014	<p>There should be <u>no</u> icon for Not Marked As Paid. The reason is that this is not a user-actionable item nor is it one of the ‘manage claims’ features. In the Quick Views, please place Not Marked As Paid after You May Owe (and before Last 30 Days Activity). Again, the reason is that it is not a user-actionable feature; it’s just another filter like You May Owe and Last 30 Days Activity.</p> <p>References to ‘Other Insurance’ should be just that that, and not ‘Other Health Insurance Plans’</p> <p>Removed Dental reference from Search options</p>	
8/13/2014	<p>Added transaction codes for Advance View (10080), Simple View (10079), Create Graph (10081) and Create Report (10082).</p> <p>Added Not Covered in Financial Graph (in most cases for a given claim it will be zero and hence would not actually appear as part of the chart)</p>	
8/14/2014	<p>Added Claim Detail with update copy from Deductible to Applied to Deductible</p> <p>Also, Paid via this Website becomes Paid Online</p>	
8/20/2014	<p>Update the Financial tabs graph to line bars vs little squares</p> <p>Claim Summary’s Hover Display payment method – Pay via this website to Pay online</p>	
8/22/2014	<p>Updated CSV spreadsheet where Out of <i>Pocket</i> Deductible should be Out of <i>Network</i> Deductible. Also, Out of Network is spelled out. Also, added the file name for the CSV can be DetailedFinancialReport.csv.</p> <p>Financial graph includes ‘Not Covered’ amount potential in both the large pie and bottom small pie (pay methods)</p>	
8/25/2014	<p>Financial Report left nav link is assigned a transaction code 10083</p>	
8/26/2014	<p>Financial Report tab – added the Family Members annotation to include subscriber and dependents names.</p> <p>Claims Summary – “MRA Paid to Provider” added to the hover menu for JPMC</p> <p>Claim Detail – Updated bottom ‘Paid Via this Website’ to ‘Paid Online’</p> <p>Added Alt Text/Accessibility for ‘Advanced View’ and ‘Simple View’ toggles as well as the new MyClaims Manager left nav graphic hover</p>	
8/27/2014	<p>Financial Report tab – Removed ‘Your Responsibility’ title above ‘All Claims’ and ‘Only claims with Your Responsibility’. Also the copy for ‘Only show claims with patient responsibility’ is updated to ‘Only claims with Your Responsibility’</p>	

8/28/2014	Claims Summary and Claims Details – Added location for ‘Understanding this page’ PDF locations Updated Financial Report page – tabs names are updated along with its graphics. In addition, added names under each pie chart.	
8/29/2014	Financial chart page – Removed arrows for Your Responsibility and moved Your Responsibility title to above the mini pie charts. Only 'Other insurance Paid' and 'Not Covered' should be suppressed if value is 0. Updated ‘Other Insurance’ to ‘Other Insurance Paid’. Added ‘Medicare Paid’ line item	
9/4/2014	Removed ‘Detailed Report’ tab and updated Financial Report page title	
9/15/2014	Added JPMC Claims Summary simple and advanced views Also added annotations to refer Glossary copy to refer to George's doc here: http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf	
9/22/2014	Added Glossary section for Financial Report	
9/23/2014	Financial Reports – included colors for the mini pie charts, alt text and decimal point limits. In addition, moved the mini pies titles to above each chart.	
9/26/2014	Financial Reports – Updated ‘Plan Paid’ to ‘Your Plan Paid’. Also added Show/Hide function for Glossary terms	
10/13/2014	Updated Simple-View to move the ? to below the title headers Also added for the Search, if no results to display, then no toggle is necessary	
10/27/2014	Financial Graph is updated to separate out Family member names to below the mini pie chart	
10/28/2014	Updated Headers and verbiage from Applied to Deductible to Deductible	
10/30/2014	Remove Detail Report tab from Financial Graph and updated Claim Details from ‘You Owe’ to ‘You May Owe’	
10/31/2014	Updated Export PDF to Save to pdf on Financial Graph page Removed Summary Graph tab	
11/6/2014	Footnote text when Patient Responsibility cannot be appropriately determined	
11/11/2014	Updated mini pie charts to move to line items and moved footnote	
11/17/14	Removed JPMC annotations for suppressing You May Owe	

Error! No table of contents entries found.

Table of Contents

[To update the table of contents, select the message below and press F9]

What's included in this document?

Applicable versions of a screen

This document may include multiple versions of a screen. Each screen version represents specific functionality for a membership group based on eligibility. The eligibility rules are conveyed in the title of the screen as well as at the line item level in the table below the wireframe. Refer to the Screen Naming Convention section of this document for more information as well as a full list of the “functional areas” that comprise the E&I consumer portals documentation.

If this is a project-specific document, this document may only contain a sub-set of the full library of screen documentation. The Consumer Portal User Interface Design team periodically publishes a full set of documentation called our CORE UIDDs.

Current CORE UIDDs are located here:

<http://adr.uhc.com/apps/myuhc2/Business%20Documents/Forms/AllItems.aspx?RootFolder=%2fapps%2fmyuhc2%2fBusiness%20Documents%2fCore%20Documents&View=%7b6D2B87E9%2d7016%2d441A%2d8B3F%2d4F31DE465571%7d>

Historic versions can be found here:

<http://adr.uhc.com/apps/MyUHC/myuhc%20Business%20Documents/Forms/AllItems.aspx?RootFolder=%2fapps%2fMyUHC%2fmyuhc%20Business%20Documents%2fCore%20Documents%2fCore%20UIDD&View=%7b136F966B%2d8930%2d41D8%2d9493%2d35408F88DDA8%7d>

Screen text

The text that displays on the screen is shown below the wireframe for the screen in a “Label/Text/Widget” column. If the text includes a variable, the variable values are provided in the “Data/Notes” column. Also provided in the Data/Notes column are alt/hover tag text.

Important note: Masters are used to represent repeating elements (including text elements) throughout this documentation. To reduce the size of the documentation – **masters are only represented in tables the first time they are shown.**

Wireframes and Tables

Each screen is documented with:

- A “Wireframe” (a line drawing of the screen) that includes key numbers for many of the specific controls,
- A Table that ties key numbers on the wireframe to specifics in the table.
- **Important note:** Masters are used to represent repeating elements throughout this documentation. To reduce the size of the documentation – **masters are only represented in tables the first time they are shown.**

- Additional details to provide context about the text is provided in On Load, On Click, and Data/Notes columns.

*What's NOT included in this document?

This document does not include any documentation for Community & State or for mobile portals. It also does not include content documented in separate content documents (common questions, also see links, glossary terms/definitions, error messages), emails, letters, postcards, iframes, PDFs, or content managed by the content management application (CMA).

Current CORE Content Documents are located here :

<http://adr.uhc.com/apps/myuhc2/Business%20Documents/Forms/AllItems.aspx?RootFolder=%2fapps%2fmyuhc2%2fBusiness%20Documents%2fCore%20Documents%2fCORE%20Content%20Documents&View=%7b6D2B87E9%2d7016%2d441A%2d8B3F%2d4F31DE465571%7d>

Historic versions can be found here:

<http://adr.uhc.com/apps/MyUHC/myuhc%20Business%20Documents/Forms/AllItems.aspx?RootFolder=%2fapps%2fMyUHC%2fmyuhc%20Business%20Documents%2fCore%20Documents%2fCore%20Content&View=%7b136F966B%2d8930%2d41D8%2d9493%2d35408F88DDA8%7d>

Transaction Codes

Transaction codes created for a project can be found sorted by SPRF#WO number here:

<http://uniteddocs.uhc.com/commercialservices2/randd/myUHCReporting/Lists/Transaction%20%20Final%20List/SPRF%20Grouped.aspx>

Conventions to Understand

Screen Naming Convention:

Screens are grouped by a numbering convention that represents “Functional Areas”. Functional areas for the Consumer Portal are:

- 1 Account Settings
- 2 Benefits & Coverage
- 3 Physicians & Facilities
- 4 Claims & Accounts
- 7 Pharmacies & Prescriptions

Individual Screens are subsequently numbered within each functional area:

- Functional area number
 - Screen number
 - Unique Alpha-character (if there are distinctions between versions of a screen)
 - Portal indicator,
 - U=myuhc, V=myhealthcareview, H= myharvardpilgrim, M=mymedica, _(underscore)=not applicable for the portal represented by that placeholder.
 - Add all portal indicators that apply.
 - Screen name,
 - (optional) distinguishing descriptor (if any distinctions between versions)
- A table keyed to the numbered callouts on the wireframes, which may explain the name, type, interaction rules, data, notes, and SRI tracing for the specific control.

Annotations

- Label/Text/Widget: Displays the exact label, text, or widget text shown on the wireframe
- On Load: describes the eligibility and business rules for a given element
- On Click: describes the interaction and display rules for a given element
- Data/Notes: Contains additional details about the element; including details about text populated into variables and alt /hover tags for accessibility.

Variables

Any text enclosed in <angle brackets> OR [[double brackets]] is a variable. The conditions affecting the variable are explained in the “Data/Notes” section shows any specifications for field size or data validations for each key element. All valid choices for the variable will be listed in the Data/Notes column of the Page Control table.

Documents Referenced In This UI DDSuppressions/Deleted Items

Items that have been suppressed or deleted are represented by placement under a large blue arrow on the right side of the screen.

Other Guidelines used to inform this document

UHC Brand Guidelines

http://brand.uhc.com/assets/docs/13430_UHC_Masterbrand_Guideline_10_10_175.pdf

Visual Style

Myuhc.com Redesign Style Guide, Cooper and Associates as modified by CXP team
<http://adr.uhc.com/apps/MyUHC/myuhc%20Business%20Documents/Core%20UI%20documents/myuhc%20Visual%20Style%20Guide.pdf>

Miscellaneous documents

PDFs and images stored on ADR may be referenced throughout this document by their filename without the full path of the file location. To locate the file, look in this folder: Image location on ADR:
<http://adr.uhc.com/apps/MyUHC/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2fapps%2fMyUHC%2fShared%20Documents%2fPortal%20PDF%20and%20Graphics&View=%7bE16FA6C2%2d747A%2d4117%2dA1DE%2d0D24E58ED0A7%7d>

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4.03a [U V _ _] Claim Summary - Default - Simple View

User Interface

[[Portal Logo]] Alliance Logo Corporate Logo Customer Logo

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Home Claims & Accounts Physicians & Facilities Pharmacies & Prescriptions Benefits & Coverage Personal Health Record Health & Wellness

myClaims Manager
Claims & Accounts

- Account Balances
- Claim Summary
- My Online Claim Payments
- Health Reimbursement Account
- Health Savings Account
- Flexible Spending Account
- Health Insurance Premium Information
- View Statements
- Financial Graph²⁴

[[CMA managed text about whatever a customer group wants and it can have an [embedded link](#) to any location, internal or external]]

Your Claim Summary

Processed and In Process Claims from the Last 30 days

Search for a claim that you would like to appeal and click on the 'Appeal this Claim' link to attach the selected claim to your appeal. [View appeal rights information](#) before submitting an appeal.

[Understanding This Page \(pdf\)](#)²⁵ [Ask a Question](#) [Export \(csv\)*](#)

Search Options

Date(s) Visited: Last 30 days²⁷ Family Members: All Family Members Claim Types: All

Quick Views: [Watched](#) [Marked as Paid](#) [Noted](#) [All Managed](#) [You May Owe](#) [Not marked as paid](#)¹⁸ [Last 30 Days Activity](#)

Other Claims

- [Prescription Claims](#)
- [Dental Claims](#)
- [Mental Health Claims](#)

Member Actions

- [Claim Forms](#)
- [My Online Payment Accounts](#)
- [Submit FSA Claim Forms](#)
- [Appeals and Grievances](#)
- [Mailing Preferences](#)
- [Direct Deposit](#)
- [Coordination of Benefits](#)
- [Request ID Cards](#)
- [Retiree Medical Savings Account](#)
- [Premium Reimbursement Account](#)
- [Health Incentive Account](#)
- [View Claim Letters](#)

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
















For dental EOBs: click the Dental Claims link and then Claims Information to see your dental EOB statements. Select the "View Claim" link to find your **Explanation of Benefits** (EOB).

[Advanced view >>](#) 23

Provider: Dr. Scott Murray, MD Go

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Family Members	Visited	Date(s) Visited	Amount Billed	Your Responsibility	You May Owe	Status	Manage Claim
April Kim	Dr. James Watson	07/22/2012	\$538.73 View Claim	\$135.33		In Process	 Edit Note
David Kim	Uptown Pharmacy	06/13/2012	\$67.80 View Claim	\$20.03		In Process	 Add Note
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$53.00 View Claim	\$32.22		In Process	 Add Note
Zach Kim	Dr. Francis William Moriarity, MD	06/10/2012	\$3.51 View Claim	\$3.51		In Process	 Add Note
	Target		\$82.22				 [Paid by 19]

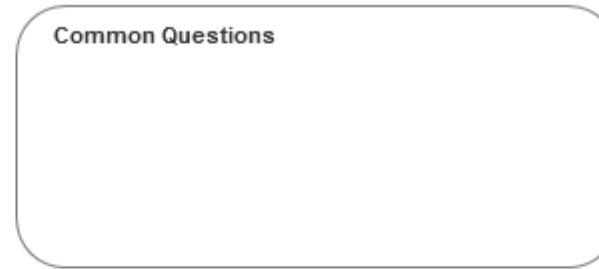
Zach Kim	 Target Pharmacy	06/13/2012	\$02.22 View Claim	method J	\$0.00 Total Savings \$8.22	Processed	  Add Note
Zach Kim	 Dr. Scott Murray, MD	06/13/2012	\$0.00 View Claim	\$0.00	\$0.00	Processed	  Add Note
Jonathan Kim	 Dr. Scott Murray, MD	06/13/2012	\$25.75 View Claim Appeal this Claim	\$0.00	\$22.38 Make Payment	Processed	  Add Note
Zach Kim	 Dr. Scott Murray, MD	06/13/2012	\$729.45 View Claim	\$235.03	\$681.74 Make Payment	Processed	  Add Note
Jonathan Kim	 Dr. Scott Murray, MD	06/13/2012	\$17.50 View Claim	\$0.00	\$0.00	Processed	  Add Note
Zach Kim	 Dr. Francis William Moriarity, MD	06/13/2012	\$49.49 View Claim	\$5.30	\$5.30 Make Payment	Processed	  Add Note

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Note: The amounts shown are for claims processed by UHC and UHC plus Medco/Express Scripts only.

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*Comma Separated Value (CSV) files can be viewed with common spreadsheet applications.



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Widget Table

Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
18	Not marked as paid - Quick View		Display in deselected state Transaction Code Assigned 10078				4-66496	
19	Help Tooltip						4-66496	Display payment method for Processed claims: - Paid at Pharmacy - HRA Paid to Provider/MRA Paid to Provider - FSA Paid to Provider/HCSA Paid to Provider - Copay paid to Provider - Paid online For JPMC, "Paid by HRA" will become "Paid by MRA" and "Paid by FSA" becomes "Paid by HCSA". Also for JPMC, also display "MRA Paid to Provider". This hover menu will be available for both simple and advance views. Hover menu should appear to the left of the 'You May Owe' amount.

User Interface Design Document for Consumer Portals

Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
20			Display in deselected state	Display menu showing all providers used by user Set All Providers as default view			4-66496	
23			"Advanced View" link Set Simple View as default view and after user has set a view, the view will be retained after a relogin. Transaction Code Assigned 10080	"Advanced View" will bring user to Advanced View Summary page and the link will turn to "Simple View"		Alt text = "Switch to Advanced View" Keyboard enabled	4-66496	
24			Transaction Code Assigned 10083	Takes user to screen KW EDIT 4.03a3 [U V _ _] Claim Summary - Advance view - Financial Graphs			4-66496	
25			Updated PDF for 'Understanding This Page' is located here: http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/4-66496%20Understanding%20the%20Claims%20Summary%20Page%20-%20Aug%202014.pdf				4-66496	
26			New column 'Your Responsibility'				4-66496	
27			Added Custom Date Range				4-66496	

4.03b [U V _ _] Claim Summary - Default - Simple View - JPMC

User Interface

[[Portal Logo]] Alliance Logo Corporate Logo Customer Logo

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Home Claims & Accounts Physicians & Facilities Pharmacies & Prescriptions Benefits & Coverage Personal Health Record Health & Wellness

myClaims Manager
Claims & Accounts

- Account Balances
- Claim Summary
- My Online Claim Payments
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- Health Savings Account
- Flexible Spending Account
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- Financial Graph ²⁴

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Your Claim Summary

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[Understanding This Page \(pdf\)](#) ²⁵ [Ask a Question](#) [Export \(csv\)*](#)

Search Options

Date(s) Visited: Last 30 days
Family Members: All Family Members
Claim Types: All

Search

Quick Views: [Watched](#) [Marked as Paid](#) [Noted](#) [All Managed](#) [You May Owe](#) [Not marked as paid](#) ¹⁸ [Last 30 Days Activity](#)



















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[Advanced view >>](#) ²³ Provider: ²⁰

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Family Members	Visited	Date(s) Visited	Amount Billed	Your Responsibility	You May Owe	Status	Manage Claim
<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="?"/> <input type="text" value="v"/>	<input type="text" value="?"/> <input type="text" value="v"/>	<input type="text" value="v"/> <input type="text" value="?"/> <input type="text" value="v"/>	<input type="text" value="v"/> <input type="text" value="?"/> <input type="text" value="v"/>	<input type="text" value="v"/>
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	Target		\$82.22		<input type="text" value="Paid by"/> ¹⁹		

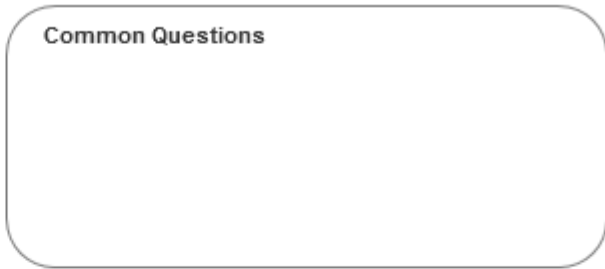
Zach Kim	 Target Pharmacy	06/13/2012	\$02.22 View Claim	method J	\$0.00 Total Savings \$8.22	Processed	  Add Note
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25			Updated PDF for 'Understanding This Page' is located here: http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/4-66496%20Understanding%20the%20Claims%20Summary%20Page%20-%20Aug%202014.pdf				4-66496	
26			For JPMC, update the current 'You May Owe' to 'Your Responsibility'. For Glossary copy for this column, refer to George's doc here: http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf				4-66496	
27			For JPMC, add the current 'You May Owe' to this view. For Glossary copy for this column, refer to George's doc here: http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf				4-66496	

4.03a3 [U V _ _] Claim Summary - Financial Graphs

User Interface



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Home	Claims & Accounts	Physicians & Facilities	Pharmacies & Prescriptions	Benefits & Coverage	Personal Health Record	Health & Wellness
------	-------------------	-------------------------	----------------------------	---------------------	------------------------	-------------------

- myClaims Manager**
- Claims & Accounts
 - Account Balances
 - Claim Summary
 - My Online Claim Payments
 - Health Reimbursement Account
 - Health Savings Account
 - Flexible Spending Account
 - Health Insurance Premium Information
 - View Statements
 - Financial Graph ¹⁶

Financial Graph ²²

[Save to PDF](#) ¹¹

Search Options


Date(s) Visited

Custom date range ⁴

mm/dd/yyyy ⁶ ⁸ to mm/dd/yyyy ⁷ ⁹

Create Graph ⁵

Total Amount Billed: \$[XXX.XX] ¹²

 ²⁰

Your Responsibility: \$[XXX.XX] ¹³

Here is how Your Responsibility breaks down:

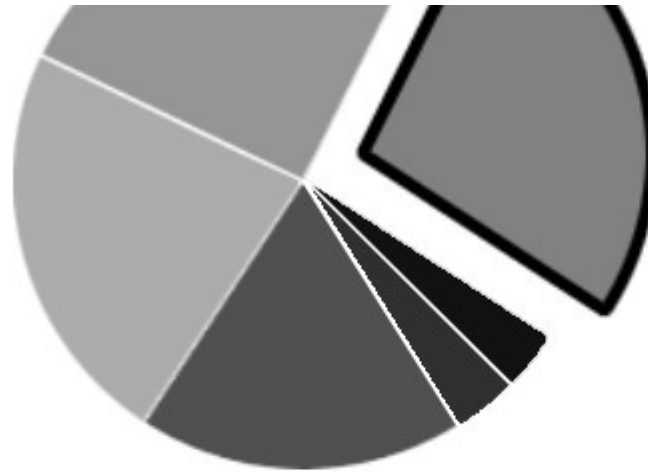
By Family Member

Other Claims

- [Prescription Claims](#)
- [Dental Claims](#)
- [Mental Health Claims](#)

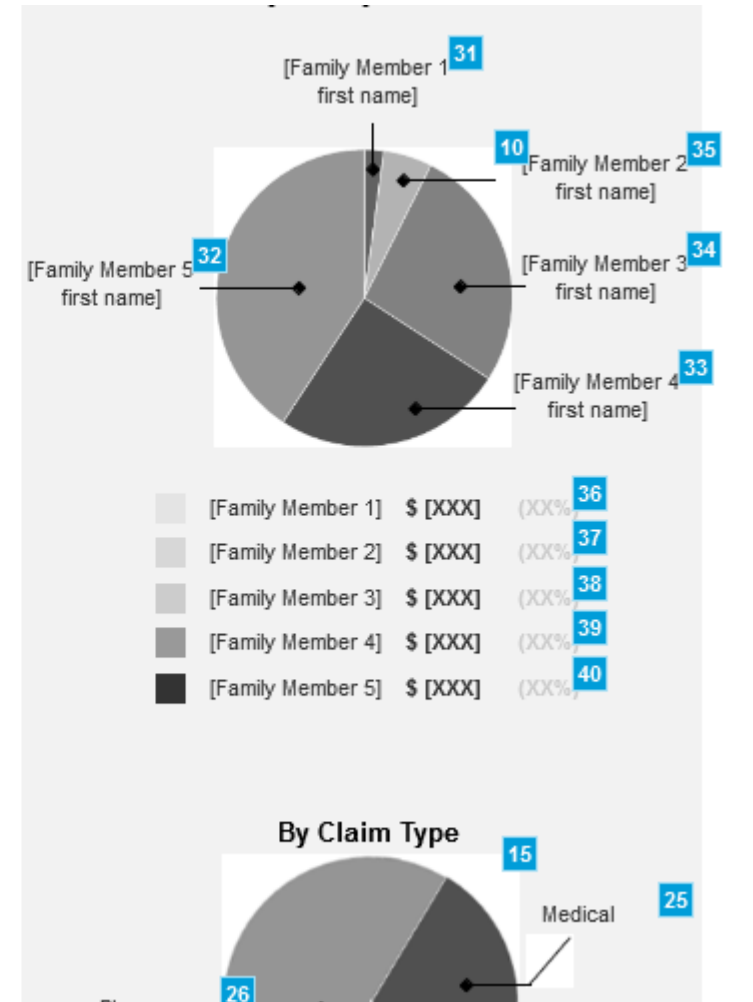
Member Actions

- [Claim Forms](#)
- [My Online Payment Accounts](#)
- [Submit FSA Claim Forms](#)
- [Appeals and Grievances](#)
- [Mailing Preferences](#)
- [Direct Deposit](#)
- [Coordination of Benefits](#)
- [Request ID Cards](#)
- [Retiree Medical Savings Account](#)
- [Premium Reimbursement Account](#)
- [Health Incentive Account](#)
- [View Claim Letters](#)

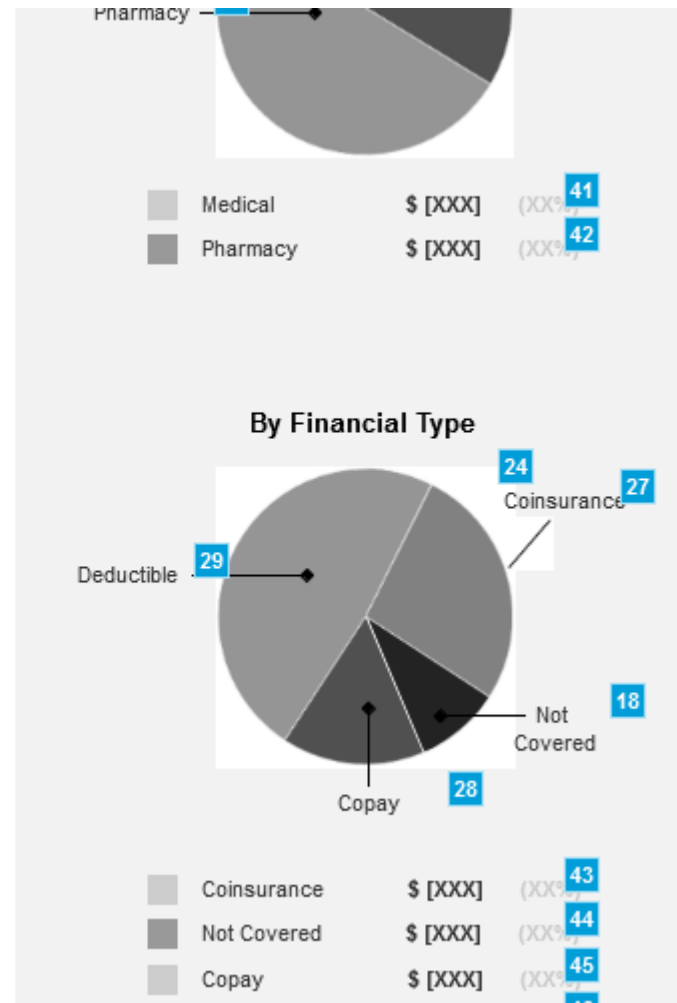


Your Benefits

Plan Discount	\$[XXX.XX]	(XX%)	14
Your Plan Paid	\$[XXX.XX]	(XX%)	30
Other Insurance Paid	\$[XXX.XX]	(XX%)	19
Not Covered	\$[XXX.XX]	(XX%)	17
Your Responsibility	\$[XXX.XX]	(XX%)	



Medicare Paid ²¹ \$[XXX.XX] (XX%)



Deductible \$ [XXX] (XX%) 40

Glossary Terms [Show more detail >>](#) 23

Note: The amounts shown are for claims processed by UHC and UHC plus Medco/Express Scripts only.

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*Comma Separated Value (CSV) files can be viewed with common spreadsheet applications.

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CMA

Widget Table

Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History
4	Drop-Down - Dates Visited	Drop-down Select List	Display drop down box and populate default option. Custom date range fields appear below after 'Custom date range' is selected from the 'Dates Visited' pull down menu.	Display drop down options: Last 30 days Last 60 days Last 6 months Current Calendar year (default) Previous Calendar Year Last 18 months Custom date range	Selection is retained - even with navigation - until session is ended	Programmatically associated form label with form control	4-66496

User Interface Design Document for Consumer Portals

Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History
5	Button Search	Button-Primary; Short	Transaction Code Assigned 10081	Create graphs below the Search options area			4-66496
6			Custom date range fields appear after 'Custom date range' is selected from the 'Dates Visited' pull down menu. mm/dd/yyyy is prefilled.	User needs to enter date using following the format mm/dd/yyyy			4-66496
7			Custom date range fields appear after 'Custom date range' is selected from the 'Dates Visited' pull down menu. mm/dd/yyyy is prefilled.	User needs to enter date using following the format mm/dd/yyyy	This is the end date. Beginning date should be before the end date. Otherwise, throw an error in red text 'Beginning date needs to be before the end date'.		4-66496
8			Custom date range fields appear after 'Custom date range' is selected from the 'Dates Visited' pull down menu. mm/dd/yyyy is prefilled. Location of image: http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/calendar_icon.jpg	Javascript calendar menu appears. User can pick their desired date and this will populate the beginning date field following the format mm/dd/yyyy	This is the beginning date. Beginning date should be before the end date. Otherwise, throw an error in red text 'Beginning date needs to be before the end date'.		4-66496
9			Custom date range fields appear after 'Custom date range' is selected from the 'Dates Visited' pull down menu. mm/dd/yyyy is prefilled.	Javascript calendar menu appears. User can pick their desired date and this will populate the beginning date field following the format mm/dd/yyyy			4-66496
10	Amount Billed Pie Chart		Display with segments representing each of the amounts. Suppress if logged in as dependent. Apply the colors below to the small pie charts. Alternate the dark and light blues in the pie chart displays and avoid any same colors touching on the pie through code: 005293 3e85ba 739ecb a6bedd D0ddee			By Family Member - [Family Member] \$ [XXX] (XX%); [Family Member] \$ [XXX] (XX%); etc	4-66496
11			Export Graph report link as a PDF file	Open Graph report in a separate window as a PDF. The name of the PDF can be FinancialGraph.pdf Refer to screen [4.03a4 [U V _ _] Claim Summary - Financial Graphs PDF]			4-66496

User Interface Design Document for Consumer Portals

Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History
12			Total amount billed. Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
13			Your Reponsibility amount. Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value. If Your Responsibility is suppressed, then small pie charts will be suppressed				4-66496
14			Corresponding to the large pie chart above, each line item lists out the breakdown of Plan Discount, Plan Paid, Other Insurance Paid and Your Responsibilities with dollar amount and percentage breakdown. Only 'Other insurance Paid', 'Not Covered' and 'Medicare Paid' should be suppressed if value is 0.				4-66496
15			Display with segments representing each of the amounts Apply the colors below to the small pie charts. Alternate the dark and light blues in the pie chart displays and avoid any same colors touching on the pie through code: 005293 3e85ba 739ecb a6bedd D0ddee			By Claim Type - Medical \$ [XXX] (XX%); Pharmacy \$ [XXX] (XX%)	4-66496
16			Transaction Code Assigned 10083	Takes user to screen KW EDIT 4.03a3 [U V _ _] Claim Summary - Advance view - Financial Graphs			4-66496
17			In most cases, for a given claim, it will be zero and hence would not actually appear as part of the chart.				4-66496
18			In most cases, for a given claim, it will be zero and hence would not actually appear as part of the chart.				4-66496
19	Other Insurance Paid Label (Key)		Updated 'Other Insurance' to 'Other Insurance Paid'				4-66496
20			Each section of the pie chart will display when applicable. Otherwise, non-applicable section will be suppressed. If Your Responsibility is suppressed, then small pie charts will be suppressed				4-66496
21			Medicare Paid added. It will be suppressed if the resulting Medicare Paid total for the claim set is zero.				4-66496
22			Updated title to 'Financial Graph'				4-66496

User Interface Design Document for Consumer Portals

Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History
23			<p>This is a dynamic Glossary Term display. Only include Glossary Terms that is displayed on this page. If a given term is not displayed on this page base on a member's view, suppress the glossary term(s).</p> <p>For Glossary, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p>	<p>Show more detail >> will expand view to display glossary terms and Show more detail >> will change to Show less detail >></p>			4-66496
24			<p>Apply the colors below to the small pie charts. Alternate the dark and light blues in the pie chart displays and avoid any same colors touching on the pie through code:</p> <p>005293 3e85ba 739ecb a6bedd D0ddee</p>			<p>By Financial Type - Coinsurance \$ [XXX] (XX%); Not Covered \$ [XXX] (XX%); Copay \$ [XXX] (XX%); Deductible \$ [XXX] (XX%)</p>	4-66496
25			Medical				4-66496
26			Pharmacy				4-66496
27							4-66496
28							4-66496
29							4-66496
30			Copy updated from 'Plan Paid' to 'Your Plan Paid'				4-66496
31			First name only of member				4-66496
32			First name only of member				4-66496
33			First name only of member				4-66496
34			First name only of member				4-66496
35			First name only of member				4-66496
36			Include first and last name of member. Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
37			Include first and last name of member. Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
38			Include first and last name of member. Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
39			Include first and last name of member. Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496

User Interface Design Document for Consumer Portals

Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History
40			Include first and last name of member. Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
41			Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
42			Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
43			Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
44			In most cases, for a given claim, it will be zero and hence would not actually appear as part of the chart. Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
45			Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496
46			Limit \$ amounts to 2 decimal places. Don't include the 2nd decimal if it's "0" on the percentage value.				4-66496

4.03a2 [U V _ _] Claim Summary - Advanced view - Condensed nav (collapsed)

User Interface

The screenshot displays the user interface for the myClaims Manager. At the top, there are four logo placeholders: [[Portal Logo]], Alliance Logo, Corporate Logo, and Customer Logo. Below these is a navigation bar with links for Message Center (N unread), Account Settings, Print, Help, Contact Us, Feedback, Sign Out, and En Español. A secondary navigation bar contains Home, Claims & Accounts, Physicians & Facilities, Pharmacies & Prescriptions, Benefits & Coverage, Personal Health Record, and Health & Wellness. The main content area features the myClaims Manager header with a notification badge '2'. Below this is a section for 'Your Claim Summary' with a sub-header 'Processed and In Process Claims from the Last 30 days'. To the right of this section are links for 'Understanding This Page (pdf)' (with a '26' badge), 'Ask a Question', and 'Export (csv)*'. A search options section includes dropdowns for 'Date(s) Visited' (set to 'Custom date range'), 'Family Members' (set to 'All Family Members'), and 'Claim Types' (set to 'Medical'), along with a 'Search' button and date input fields. Below the search options is a 'Quick Views' section with icons and links for 'Watched', 'Marked as Paid', 'Noted', 'All Managed', 'You May Owe' (with a '12' badge), 'Not Marked as Paid' (with a '14' badge), and 'Last 30 Days Activity'. At the bottom, there is a status '(Showing 11-20 of 26)', a 'View All' link, a 'Simple view >>' link (with a '20' badge), a 'Provider:' dropdown menu (set to 'Dr. Scott Murray, MD' with a '15' badge) and a 'Go' button, and finally 'Prev [x]' and 'Next [x]' navigation links.

Family Members	Visited	Date(s) Visited	Amount Bill	Your Plan Paid	Plan Discount	Deductible	Your Responsibility	You May Owe	Status	Manage Claim
▼	▼	▼	25 18	21	22	23	24	?	?	?
David Kim	Dr. Scott Murray, MD	06/13/2012	\$1284.00 View Claim	\$925.08	\$928.00	\$928.00	\$1249.00		In Process	 Edit Note
David Kim	Uptown Pharmacy	06/13/2012	\$67.80 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$53.00 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note
Zach Kim	Dr. Francis William Moriarity, MD	06/10/2012	\$3.51 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note
Zach Kim	Target Pharmacy	06/13/2012	\$82.22 View Claim	\$---	\$---	\$---	[Paid by method] 16 \$0.00 Total Savings \$8.22		Processed	 Add Note
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$0.00 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	 Add Note
Jonathan		06/13/2012	\$25.75 View	e	e	e	e	\$0.00	Processed	

Kim	Dr. Scott Murray, MD	06/13/2012	View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	Add Note
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$729.45 View Claim	\$---	\$---	\$---	\$---	\$681.74 Make Payment	Processed	Add Note
Jonathan Kim	Dr. Scott Murray, MD	06/13/2012	\$17.50 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	Add Note
Zach Kim	Dr. Francis William Moriarity, MD	06/13/2012	\$49.49 View Claim	\$---	\$---	\$---	\$---	\$5.30 Make Payment	Processed	Add Note

(Showing 11-20 of 26) [View All](#) [Prev \[x\]](#) | [Next \[x\]](#)

Note: The amounts shown are for claims processed by UHC and UHC plus Medco/Express Scripts only.

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*Comma Separated Value (CSV) files can be viewed with common spreadsheet applications.

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Widget Table

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
2				Condensed navigation			Alt text = "myClaims Manager" Keyboard enabled	4-66496	Show full left navigation. If you hover away, the navigation will go away. Refer to page 4.03a3 [U V _ _] Claim Summary - Advance view - Condensed nav (expanded) to see the expanded menu.
12	You Owe - Quick View			Display in deselected state Suppress for JPMC	This is a toggle element. Click to toggle between selected and deselected states. When clicked to selected state: 1. Display with 'selected' indicator (border) 2. Set search options to - Last 18 months - All Family Members - All Claim Types 3. Display all claims with a non-zero You Owe amount. When clicked to deselected state, restore default view			4-66496	
14	Marked as Paid - Quick View			Display in deselected state. Transaction Code Assigned 10078				4-66496	
15				Display in deselected state	Display menu showing all providers used by user. This filter only shows after the search submission. Set All Providers as default view			4-66496	

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
16	Help Tooltip							4-66496	<p>Display payment method for Processed claims:</p> <ul style="list-style-type: none"> - Paid at Pharmacy - HRA Paid to Provider/MRA Paid to Provider - FSA Paid to Provider/HCSA Paid to Provider - Copay paid to Provider - Paid online <p>For JPMC, "Paid by HRA" will become "Paid by MRA" and "Paid by FSA" becomes "Paid by HCSA". Also for JPMC, also display "MRA Paid to Provider".</p> <p>This hover menu will be available for both simple and advance views. Hover menu should appear to the left of the 'You May Owe' amount.</p>
18				<p>Sort arrow moved to below the column title</p> <p>Location of arrow graphics is here: http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/down_arrows.zip</p>				4-66496	
20	Switch to Medical Account Balances			<p>"Simple View" link</p> <p>Set Simple View as default view and after user has set a view, the view will be retained after a relogin.</p> <p>Transaction Code Assigned 10079</p>	"Simple View" will bring user to Simple View Summary page and the link will turn to "Advanced View"		<p>Alt text = "Switch to Simple View"</p> <p>Keyboard enabled</p>	4-66496	
21				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	

User Interface Design Document for Consumer Portals

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
22				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
23				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
24				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
25				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
26				<p>Updated PDF for 'Understanding This Page' is located here:</p> <p>http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/4-66496%20Understanding%20the%20Claims%20Summary%20Page%20-%20Aug%202014.pdf</p>				4-66496	

4.03a3 [U V _ _] Claim Summary - Advanced view - Condensed nav (expanded)

User Interface

The screenshot displays the myClaims Manager interface. At the top, there are four logo placeholders: [[Portal Logo]], Alliance Logo, Corporate Logo, and Customer Logo. Below these is a navigation bar with links for Message Center (N unread), Account Settings, Print, Help, Contact Us, Feedback, Sign Out, and En Español. A secondary navigation bar contains Home, Claims & Accounts, Physicians & Facilities, Pharmacies & Prescriptions, Benefits & Coverage, Personal Health Record, and Health & Wellness. The main content area features a sidebar for myClaims Manager with a dropdown arrow and a notification badge '2'. The sidebar lists 'Claims & Accounts' (Account Balances, Claims Summary, My Claim Payments, Health Reimbursement Account, View Statements, View Claim Letters) and 'Other Claims' (Prescription Claims, Vision Claims, Dental Claims, Mental Health Claims). The main content area includes a placeholder for CMA managed text, a notification badge '26' for 'Understanding This Page (pdf)', and links for 'Ask a Question' and 'Export (csv)*'. Below this is a search section with 'Family Members' (All Family Members) and 'Claim Types' (Medical) dropdowns, a 'Search' button, and a date range input 'to mm/dd/yyyy'. At the bottom, there are filters for 'Noted', 'All Managed', 'You May Owe' (12), 'Not Marked as Paid' (14), and 'Last 30 Days Activity'. A 'Provider' dropdown is set to 'Dr. Scott Murray, MD' (15) with a 'Go' button and 'Prev [x]' and 'Next [x]' links. A 'Simple view >>' link is also present.

Member Actions		Date(s) Visited	Amount Bill	Your Plan Paid	Plan Discount	Deductible	Your Responsibility	You May Owe	Status	Manage Claim
Claim Forms Manage My Claim Payment Accounts Submit HRA Claims Online Appeals and Grievances Mailing and Email Preferences Direct Deposit Coordination of Benefits Request ID Cards		06/13/2012	\$1284.00 View Claim	\$925.08	\$928.00	\$928.00	\$1249.00		In Process	 Edit Note
		06/13/2012	\$67.80 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note
		06/13/2012	\$53.00 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note
		06/10/2012	\$3.51 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note
Zach Kim	Target Pharmacy	06/13/2012	\$82.22 View Claim	\$---	\$---	\$---	[Paid by method]	\$0.00 Total Savings \$8.22	Processed	 Add Note
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$0.00 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	 Add Note
Jonathan		06/13/2012	\$25.75 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	

Kim	Dr. Scott Murray, MD	06/13/2012	View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	Add Note
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$729.45 View Claim	\$---	\$---	\$---	\$---	\$681.74 Make Payment	Processed	Add Note
Jonathan Kim	Dr. Scott Murray, MD	06/13/2012	\$17.50 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	Add Note
Zach Kim	Dr. Francis William Moriarity, MD	06/13/2012	\$49.49 View Claim	\$---	\$---	\$---	\$---	\$5.30 Make Payment	Processed	Add Note

(Showing 11-20 of 26) [View All](#)

[Prev \[x\]](#) | [Next \[x\]](#)

Note: The amounts shown are for claims processed by UHC and UHC plus Medco/Express Scripts only.

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*Comma Separated Value (CSV) files can be viewed with common spreadsheet applications.

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Widget Table

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
2				Condensed navigation. Image for MyClaims Manager is here: http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/myClaimsManager.jpg			Alt text = "myClaims Manager" Keyboard enabled	4-66496	Show full left navigation. If you hover away, the navigation will go away.
12	You Owe - Quick View			Display in deselected state Suppress for JPMC	This is a toggle element. Click to toggle between selected and deselected states. When clicked to selected state: 1. Display with 'selected' indicator (border) 2. Set search options to - Last 18 months - All Family Members - All Claim Types 3. Display all claims with a non-zero You Owe amount. When clicked to deselected state, restore default view			4-66496	
14	Marked as Paid - Quick View			Display in deselected state. Transaction Code Assigned 10078				4-66496	
15				Display in deselected state	Display menu showing all providers used by user Set All Providers as default view			4-66496	

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
16	Help Tooltip							4-66496	<p>Display payment method for Processed claims:</p> <ul style="list-style-type: none"> - Paid at Pharmacy - HRA Paid to Provider/MRA Paid to Provider - FSA Paid to Provider/HCSA Paid to Provider - Copay paid to Provider - Paid online <p>For JPMC, "Paid by HRA" will become "Paid by MRA" and "Paid by FSA" becomes "Paid by HCSA". Also for JPMC, also display "MRA Paid to Provider".</p> <p>This hover menu will be available for both simple and advance views. Hover menu should appear to the left of the 'You May Owe' amount.</p>
18				Sort arrow moved to below the column title.				4-66496	
				Location of arrow graphics is here: http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/down_arrows.zip					
21				For Glossary copy for this column, refer to George's doc here: http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf Update Glossary hover menu font size to 12px				4-66496	
22				For Glossary copy for this column, refer to George's doc here: http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf Update Glossary hover menu font size to 12px				4-66496	

User Interface Design Document for Consumer Portals

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
23				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
24				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
25				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
26				<p>Updated PDF for 'Understanding This Page' is located here:</p> <p>http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/4-66496%20Understanding%20the%20Claims%20Summary%20Page%20-%20Aug%202014.pdf</p>				4-66496	

4.03a4 [U V _ _] Claim Summary - Advanced view - Condensed nav (collapsed) - JPMC

User Interface

The screenshot displays the myClaims Manager interface. At the top, there are four logo placeholders: [[Portal Logo]], Alliance Logo, Corporate Logo, and Customer Logo. Below these is a navigation bar with links for Message Center (N unread), Account Settings, Print, Help, Contact Us, Feedback, Sign Out, and En Español. A main navigation menu includes Home, Claims & Accounts, Physicians & Facilities, Pharmacies & Prescriptions, Benefits & Coverage, Personal Health Record, and Health & Wellness. The myClaims Manager section features a dropdown menu with a notification badge '2' and a placeholder for CMA managed text. The main content area is titled 'Your Claim Summary' and includes links for 'Understanding This Page (pdf)' (with badge '25'), 'Ask a Question', and 'Export (csv)*'. Below this is a 'Search Options' section with filters for Date(s) Visited (Custom date range), Family Members (All Family Members), and Claim Types (Medical), along with a Search button. The interface also includes 'Quick Views' for Watched, Marked as Paid, Noted, All Managed, You May Owe (with badge '12'), Not Marked as Paid (with badge '14'), and Last 30 Days Activity. At the bottom, it shows '(Showing 11-20 of 26)', 'View All', 'Simple view >>' (with badge '20'), a 'Provider:' dropdown set to 'Dr. Scott Murray, MD' (with badge '15') and a 'Go' button, and 'Prev [x]' and 'Next [x]' navigation links.

Family Members	Visited	Date(s) Visited	Amount Bill	Your Plan Paid	Plan Discount	Deductible	Your Responsibility	You May Save	Status	Manage Claim	
▼	▼	▼	24 \$	18 \$	21 ?	22 \$	23 \$	26 \$	27 \$?	▼
David Kim	Dr. Scott Murray, MD	06/13/2012	\$1284.00 View Claim	\$925.08	\$928.00	\$928.00	\$1249.00		In Process	 Edit Note	
David Kim	Uptown Pharmacy	06/13/2012	\$67.80 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note	
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$53.00 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note	
Zach Kim	Dr. Francis William Moriarity, MD	06/10/2012	\$3.51 View Claim	\$---	\$---	\$---	\$---		In Process	 Add Note	
Zach Kim	Target Pharmacy	06/13/2012	\$82.22 View Claim	\$---	\$---	\$---	\$---	[Paid by method] 16 \$0.00 Total Savings \$8.22	Processed	 Add Note	
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$0.00 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	 Add Note	
Jonathan		06/13/2012	\$25.75 View	e	e	e	e	\$0.00	Processed		

Kim	Dr. Scott Murray, MD	06/13/2012	View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	Add Note
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$729.45 View Claim	\$---	\$---	\$---	\$---	\$681.74 Make Payment	Processed	Add Note
Jonathan Kim	Dr. Scott Murray, MD	06/13/2012	\$17.50 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	Add Note
Zach Kim	Dr. Francis William Moriarity, MD	06/13/2012	\$49.49 View Claim	\$---	\$---	\$---	\$---	\$5.30 Make Payment	Processed	Add Note

(Showing 11-20 of 26) [View All](#) [Prev \[x\]](#) | [Next \[x\]](#)

Note: The amounts shown are for claims processed by UHC and UHC plus Medco/Express Scripts only.

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*Comma Separated Value (CSV) files can be viewed with common spreadsheet applications.

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Today's Date [\[Month DD, YYYY\]](#) |

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Controlled by Content Management Application

CMA

Widget Table

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
2				Condensed navigation			Alt text = "myClaims Manager" Keyboard enabled	4-66496	Show full left navigation. If you hover away, the navigation will go away. Refer to page 4.03a3 [U V _ _] Claim Summary - Advance view - Condensed nav (expanded) to see the expanded menu.
12	You Owe - Quick View			Display in deselected state Suppress for JPMC	This is a toggle element. Click to toggle between selected and deselected states. When clicked to selected state: 1. Display with 'selected' indicator (border) 2. Set search options to - Last 18 months - All Family Members - All Claim Types 3. Display all claims with a non-zero You Owe amount. When clicked to deselected state, restore default view			4-66496	
14	Marked as Paid - Quick View			Display in deselected state. Transaction Code Assigned 10078				4-66496	
15				Display in deselected state	Display menu showing all providers used by user. This filter only shows after the search submission. Set All Providers as default view			4-66496	

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
16	Help Tooltip							4-66496	<p>Display payment method for Processed claims:</p> <ul style="list-style-type: none"> - Paid at Pharmacy - HRA Paid to Provider/MRA Paid to Provider - FSA Paid to Provider/HCSA Paid to Provider - Copay paid to Provider - Paid online <p>For JPMC, "Paid by HRA" will become "Paid by MRA" and "Paid by FSA" becomes "Paid by HCSA". Also for JPMC, also display "MRA Paid to Provider".</p> <p>This hover menu will be available for both simple and advance views. Hover menu should appear to the left of the 'You May Owe' amount.</p>
18				<p>Sort arrow moved to below the column title</p> <p>Location of arrow graphics is here: http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/down_arrows.zip</p>				4-66496	
20	Switch to Medical Account Balances			<p>"Simple View" link</p> <p>Set Simple View as default view and after user has set a view, the view will be retained after a relogin.</p> <p>Transaction Code Assigned 10079</p>	<p>"Simple View" will bring user to Simple View Summary page and the link will turn to "Advanced View"</p>		<p>Alt text = "Switch to Simple View"</p> <p>Keyboard enabled</p>	4-66496	
21				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	

User Interface Design Document for Consumer Portals

Footnote	Label	Interactions	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History	On Hover
22				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
23				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
24				<p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
25				<p>Updated PDF for 'Understanding This Page' is located here:</p> <p>http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/4-66496%20Understanding%20the%20Claims%20Summary%20Page%20-%20Aug%202014.pdf</p>				4-66496	
26				<p>For JPMC, update the current 'You May Owe' to 'Your Responsibility'.</p> <p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p> <p>Update Glossary hover menu font size to 12px</p>				4-66496	
27				<p>For JPMC, add the current 'You May Owe' to this view.</p> <p>For Glossary copy for this column, refer to George's doc here:</p> <p>http://adr2.uhc.com/apps/MyUHC/myuhc%2014.4%20November%20Release/Design/4-66496%20myClaims%20Manager%20Enhancements%20Glossary-Tooltips.pdf</p>				4-66496	

4.04a2 [U V _ _] Medical Claim Detail

User Interface

[[Portal Logo]]

Alliance Logo

Corporate Logo

Customer Logo

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myClaims Manager

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- [Claim Summary](#)
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- [Health Reimbursement Account](#)
- [Health Savings Account](#)
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- [Financial Graph](#)

Claim for [Patient Name] [Back to Previous Page](#)

[Understanding This Page \(pdf\)](#) 15 [Appeal this Claim](#) [Ask a Question](#)

Visited	[[Provider Name]]	Status	Processed 12/02/2009
Date(s) of Service	11/12/2009-11/16/2009	Date Received	11/20/2009
Claim Number	205MR039900		

[Explanation of Benefits \(pdf\)](#) ? [\[Variable\] Explanation of Benefits \(pdf\)](#)

An Explanation of Benefits (EOB) is not available. [Why Not?](#)

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Manage This Claim ?

👁 [{Variable Watch This Claim}](#)

✅ [\[Variable Mark as Paid\]](#)

✎ [\[Variable Add/Edit\]](#)

📝 **Your Note:** [Content saved by user] [Show More Detail](#) ▼

Other Claims

- [Prescription Claims](#)
- [Dental Claims](#)
- [Mental Health Claims](#)

Member Actions

- [Claim Forms](#)
- [My Online Payment Accounts](#)
- [Submit FSA Claim Forms](#)
- [Appeals and Grievances](#)
- [Mailing Preferences](#)
- [Direct Deposit](#)
- [Coordination of Benefits](#)
- [Request ID Cards](#)
- [Retiree Medical Savings Account](#)
- [Premium Reimbursement Account](#)
- [Health Incentive Account](#)
- [View Claim Letters](#)

At a Glance

Amount Billed **[\$XXX.XX]**

Plan Discounts	\$[XXX.XX]
Your Plan Paid	\$[XXX.XX]
Other Insurance	\$[XXX.XX]
Medicare Paid	\$[XXX.XX]
Your Responsibility	\$[XXX.XX]

Deductible 10 [\$\$\$].xx

Copay [\$\$\$].xx

Coinsurance [\$\$\$].xx

Not Covered [\$\$\$].xx

Your Responsibility ? [\$\$\$].xx

- [Variable (FSA)] Paid to Provider [\$\$\$].xx
- [Variable (HRA)] Paid to Provider [\$\$\$].xx
- Copay Paid to Provider [\$\$\$].xx
- Paid Online 12 ? [\$\$\$].xx

? You May Owe [\$\$\$].xx

[Make Payment](#) ?

[View Account Balance](#)

Detailed Costs

Amount Billed	Plan	Your Plan	Applied to Deductible	Copay	Coinsurance	Not Covered	Your
---------------	------	-----------	-----------------------	-------	-------------	-------------	------

	Discounts	Paid	Deductible				Responsibility
mm/dd/yyyy	[Service description summary]						Show Less Detail ▲
\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx
Service Description: [Service description detail] Claim Codes: [Claim Code content]							
mm/dd/yyyy	[Service description summary]						Show More Detail ▼
\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx
mm/dd/yyyy	[Service description summary]						Show More Detail ▼
\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx
mm/dd/yyyy	[Service description summary]						Show More Detail ▼
\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx
mm/dd/yyyy	[Service description summary]						Show More Detail ▼
\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx

\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx*	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx	\$x,xxx.xx
------------	------------	-------------	------------	------------	------------	------------	------------

**For details, view the EOB for this claim. ¹⁶

[Variable (HRA)] Paid to Provider	\$x,xxx.xx
[Variable (FSA)] Paid to Provider	\$x,xxx.xx
Copay Paid to Provider	\$x,xxx.xx
Paid Online ¹³ ?	\$x,xxx.xx

? You Owe \$x,xxx.xx

[Variable (HRA)] Paid to You	\$x,xxx.xx
[Variable (FSA)] Paid to You	\$x,xxx.xx

[Make Payment](#) ?

[Back to Top](#)

<p>Claim History:</p> <p>mm/dd/yyyy [Claim history content]</p> <p>mm/dd/yyyy [Claim history content]</p> <p>mm/dd/yyyy [Claim history content]</p>	<p>Paid Online: ¹⁴</p> <p>mm/dd/yyyy [Transaction Type] of \$xxx.xx [- Voided]. Details</p> <p>mm/dd/yyyy [Transaction Type] of \$xxx.xx [- Voided]. Details</p>
--	--

mm/dd/yyyy [Claim history content]

Claim Notes:

Remark Code [xx]: [Descriptive content]

Remark Code [xx]: [Descriptive content]

[Claim note content]

[Claim note content]

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 Controlled by Content Management Application

Today's Date [[Month DD, YYYY]] |
 [\[\[© YYYY Company Name\]\]](#)

 CMA

Widget Table

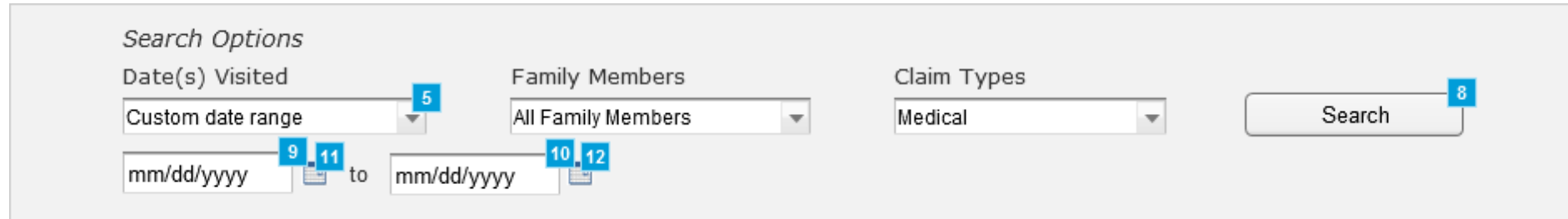
Footnote	Label	Interactions	Style	On Load	Data Notes	Alt Text/Accessibility	Rev. History
10				Updated 'Applied to Deductible' to 'Deductible'			4-66496
11				Updated 'Deductible' to 'Applied to Deductible'			4-66496
12				Updated 'Paid via this website' to 'Paid online'			4-66496
13				Updated 'Paid via this website' to 'Paid online'			4-66496

User Interface Design Document for Consumer Portals

Footnote	Label	Interactions	Style	On Load	Data Notes	Alt Text/Accessibility	Rev. History
14				Updated 'Paid via this website' to 'Paid online'			4-66496
15				Updated PDF for 'Understanding This Page' is located here: http://adr2.uhc.com/progs/10-00000-868/myClaims%20Manager%20Enhancements-Consumer%20Enablement-400066496/Initiation%20Requirements/4-66496%20Understanding%20the%20Claims%20Detail%20Page%20-%20Aug%202014.pdf			4-66496
16				Footnote text when Patient Responsibility cannot be appropriately determined			4-66496

Claim Summary Search Options Extended

User Interface



Widget Table






















Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History
5	Drop-Down - Dates Visited	Drop-down Select List	Display drop down box and populate default option. Custom date range fields appear below after 'Custom date range' is selected from the 'Dates Visited' pull down menu.	Display drop down options: Last 30 days (default) Last 60 days Last 6 months Current Calendar year Previous Calendar Year Last 18 months Custom date range	Selection is retained - even with navigation - until session is ended	Programmatically associated form label with form control	4-66496
8	Button Search	Button-Primary; Short		The toggle to switch for both Advanced to Simple view should disappear when there are no results to display.	Note: Filter selections are retained in results, even through navigation, until changed by user or session is terminated.	508 Compliance Text Contrast Change to: #FFFFFF (Text) ##005293 (background) Match existing button formats.	4-66496
9			Custom date range fields appear after 'Custom date range' is selected from the 'Dates Visited' pull down menu. mm/dd/yyyy is prefilled.	User needs to enter date using following the format mm/dd/yyyy			4-66496
10			Custom date range fields appear after 'Custom date range' is selected from the 'Dates Visited' pull down menu. mm/dd/yyyy is prefilled.	User needs to enter date using following the format mm/dd/yyyy	This is the end date. Beginning date should be before the end date. Otherwise, throw an error in red text 'Beginning date needs to be before the end date'.		4-66496
11			Custom date range fields appear after 'Custom date range' is selected from the 'Dates Visited' pull down menu. mm/dd/yyyy is prefilled.	Javascript calendar menu appears. User can pick their desired date and this will populate the beginning date field following the format mm/dd/yyyy	This is the beginning date. Beginning date should be before the end date. Otherwise, throw an error in red text 'Beginning date needs to be before the end date'.		4-66496

User Interface Design Document for Consumer Portals

Footnote	Label	Style	On Load	On Click	Data Notes	Alt Text/Accessibility	Rev. History
12			Custom date range fields appear after 'Custom date range' is selected from the 'Dates Visited' pull down menu. mm/dd/yyyy is prefilled.	Javascript calendar menu appears. User can pick their desired date and this will populate the beginning date field following the format mm/dd/yyyy			4-66496

KW Edit Wdgt - Claim Summary Table - Extended

User Interface

Family Members	Visited	Date(s) Visited	Amount Billed	Your Plan Paid	Plan Discount	Deductible	Your Responsibility	You May Owe	Status	Manage Claim
V	V	V	?	?	?	?	?	?	?	V
David Kim	 Dr. Scott Murray, MD	06/13/2012	\$1284.00 View Claim	\$925.08	\$928.00	\$928.00	\$1249.00		In Process	  Edit Note
David Kim	 Uptown Pharmacy	06/13/2012	\$67.80 View Claim	\$---	\$---	\$---	\$---		In Process	  Add Note
Zach Kim	 Dr. Scott Murray, MD	06/13/2012	\$53.00 View Claim	\$---	\$---	\$---	\$---		In Process	  Add Note
Zach Kim	 Dr. Francis William Morianity, MD	06/10/2012	\$3.51 View Claim	\$---	\$---	\$---	\$---		In Process	  Add Note
Zach Kim	 Target Pharmacy	06/13/2012	\$82.22 View Claim	\$---	\$---	\$---	\$---	\$0.00 Total Savings \$8.22	Processed	  Add Note
Zach Kim	 Dr. Scott Murray, MD	06/13/2012	\$0.00 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed	  Add Note
Jonathan	 Dr. Scott	06/13/2012	\$25.75 View	\$---	\$---	\$---	\$---	\$0.00	Processed	 

KIM	Dr. Scott Murray, MD		Claim								Add Note
Zach Kim	Dr. Scott Murray, MD	06/13/2012	\$729.45 View Claim	\$---	\$---	\$---	\$---	\$681.74 Make Payment	Processed		Add Note
Jonathan Kim	Dr. Scott Murray, MD	06/13/2012	\$17.50 View Claim	\$---	\$---	\$---	\$---	\$0.00	Processed		Add Note
Zach Kim	Dr. Francis William Moriarity, MD	06/13/2012	\$49.49 View Claim	\$---	\$---	\$---	\$---	\$5.30 Make Payment	Processed		Add Note

Widget Table

Footnote	Label	On Load	Alt Text/Accessibility	Rev. History
5		New column 'Your Plan Paid' Glossary text: The amount the plan paid for covered health care services or products. Does not include amounts paid from a Health Reimbursement Account (HRA), Health Savings Account (HSA), or Flexible Spending Account (FSA) account, if applicable.		4-66496
6		New column 'Plan Discount' Glossary term: use existing		4-66496
7		New column 'Applied to Deductible' Glossary term: use existing		4-66496
8		New column 'Your Responsibility' Glossary term: use existing		4-66496