

### Login Screens

- 1.0 Login
- 1.0b Login failure
- 1.0c Recovery paths

### MyCPG Accounts

- 2.0 MyCPG Accounts
- 2.01 Edit demographic info
- 2.02 Edit personal info
- 2.03 Edit marital status
- 2.04 Edit communication preferences
- 2.05 Add/Edit dependent
- 2.08 Report Death
- 3.10 Setup WSS Account
- 3.11 Update CPG / view EEI
- 3.14 Enter Dependents
- 3.21 Contact Financial Planner
- 3.22 Vendor site enrollment
- 3.15 View and Enroll in benefits
- 3.17 Add Beneficiaries to plans
- 3.23 Decline benefits
- 14.01 Change billing coverage
- 15.01 Update banking info
- 16.01 Pension - change withholdings
- 17.01 Add / Update Beneficiary
- 20.03 Compensation update implications
- 20.04 View compensation history
- 21.01 Pensioned retiree apply to work
- 21.01 Pensioned retiree not eligible to work
- 18.01 Request benefit verification letter
- 18.02 Contact CS if I need add'l info not in template

### Administrator Resource Center (ARC)

- 4.0 ARC Home
- 3.01 Search for employee
- 3.02 View & Update Existing user
- 3.03 Create new Lay employee
- 3.04 Enter Dependents
- 21.02 Apply for retiree to WWP
- 3.05 Enroll new clergy in benefits
- 3.06 Enroll new lay employee in benefits
- 3.25 Enroll employees in all benefits
- 3.33 Enter Non-Stipendiary employment
- 2.12 As a CPG CSR make updates on members' behalf
- 19.01 Terminate employment
- 19.03b View termination details
- 18.03 CSR edit benefit verification template
- 19.06 Execute severance package
- 20.01 Update employee compensation
- 20.05 Run compensation reports
- 18.04 CSR upload verification letter to member dashboard
- 18.05 CSR Send 3rd party requested letter
- 23.01 Ordination officer report suspension, deposition, restriction
- 23.02 Recorder of Ordination receive suspension, deposition, restriction report
- 23.03 CSR process termination of benefits for suspended cleric
- 23.06 Recorder of ordinations view all suspensions, depositions, and restrictions
- 4.01 Lead - determine org eligibility for CPG benefits
- 4.02 Lead - request quote
- 4.03 Schedule call re: quote
- 4.04 Lead - create account with CPG WSS to request quote
- 4.05 Request Quote
- 4.06 Lead - submit RFP via dashboard
- 4.07 IBAMS AM - proposal status
- 4.08 Benefits policy mgr - pricing model complete
- 4.09 IBAMS AM - create proposal
- 4.10 Lead - review quote
- 4.11 CPG employee - proposal note capture
- 4.12 Lead - sign acceptance docs
- 6.01 Dio Admin - set new client admin permissions
- 6.03 New client admin training overview
- 6.04 Client admin resources available overview
- 7.01 Client Admin - schedule annual outreach call
- 7.02 Client Admin - annual enrollment webinar signup
- 7.03 AM - capture client feedback
- 7.05 CA - view benefit plans and pricing
- 7.06 CA - select plans to offer to employees
- 5.01 Upload employee list
- 5.03 CA - Set org preferences

### Notification System

#### Employee

- NE2.06 Next step notification on demographic change
- NE3.19 Non-WWP retiree in CPG plan
- NE3.20 Employee in CPG EOB new coverage
- NE3.26 Reminder to enroll or decline
- NE3.08.4 Benefits updated based on new employer
- NE3.32 Comp < HMC and <20 yrs srcv MMKU advisement
- NE3.28 Enrollment updates
- NE2.09 Remind to update info annually
- NE3.18 Exempt employee with MedSup coverage
- NE3.29 Previous employment termination notice
- NE15.02 Bank account issues
- NE19.05 Benefit guidance for terminated employee
- NE16.02 Pension - change withholdings on state or country change
- NE16.03 Pension - status of withholding update
- NE17.02 Update beneficiaries annually
- NE20.02 Compensation update
- NE21.06 WWP Retiree maximum time approaching
- NE23.04 Benefit termination for deposited or suspended
- NE5.04 Setup WSS account
- NE5.06 Welcome packet available

#### Admin

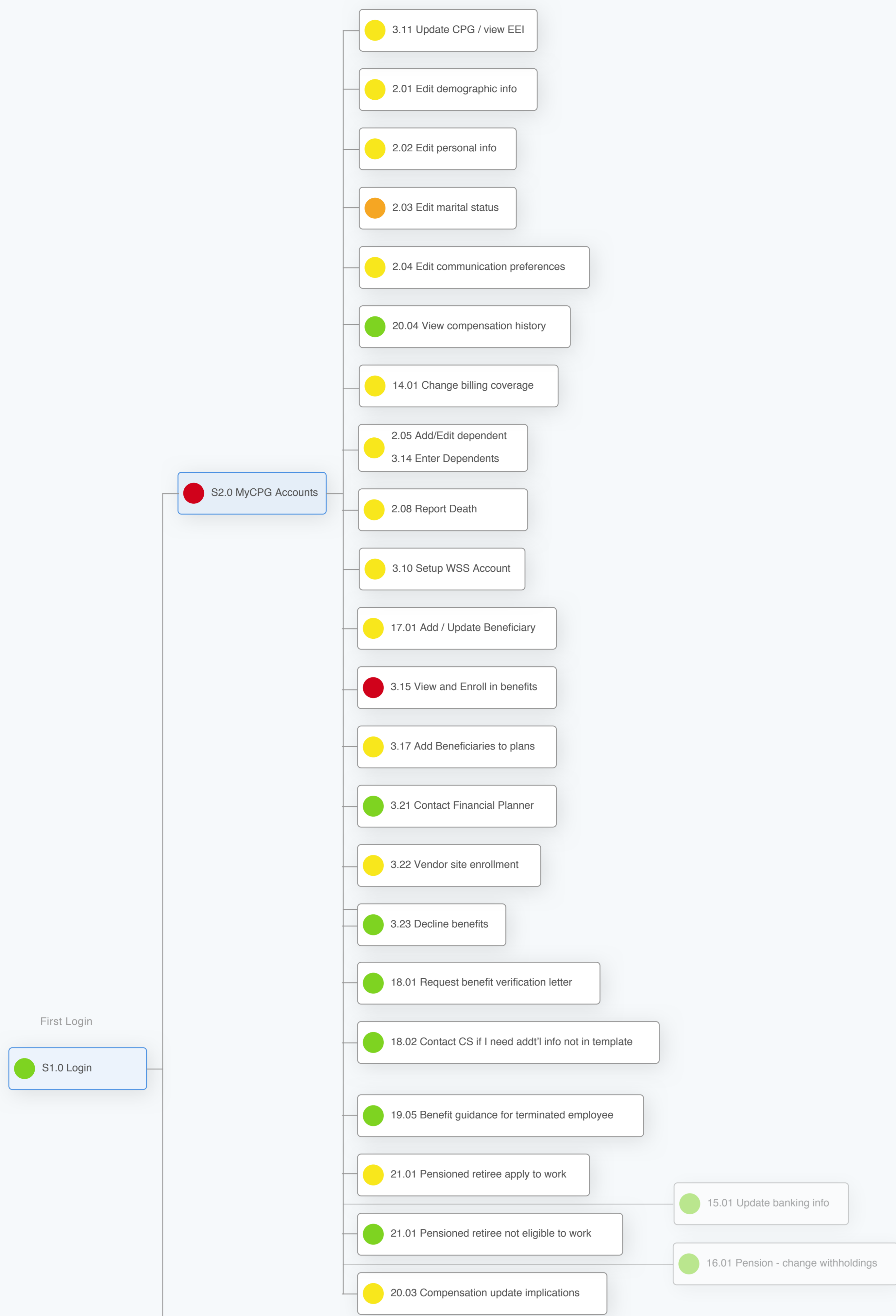
- NA3.12 Retired Lay person working >1000 hours
- NA3.24 Vendor notice - completed enrollment
- NA3.30 Notify Diocese of selection as payor
- NA2.07 Document upload notification
- NA3.16 New employee completed enrollment
- NA3.27 Optional benefit enrollment incomplete
- NA3.31 New plan adoption opportunity
- NA19.02 Diocese admin notice of terminations
- NA19.03 Termination Approved by DIO admin
- NA19.04 Termination Overridden by DIO admin
- NA21.07 WWP Retiree maximum time approaching
- NA23.05 Cleric benefits terminated
- NA6.02 Account Mgr - new client admin setup
- NA7.04 Client admin - plans available for selection
- NA7.07 Client admin - select plans
- NA7.08 AM - client admin completes plan selections
- NA5.06 CA - Welcome packet ready to send

#### General, Shared, or Multi-Use

- NG5.02 Upload Successful / Not successful
- NG2.0 Save Successful / Not successful
- NG3.0 Confirm Choice
- NG21.04 Application status
- NG21.05 WPP application status

#### Prompts

- P3.13 Actively employed and receiving benefits

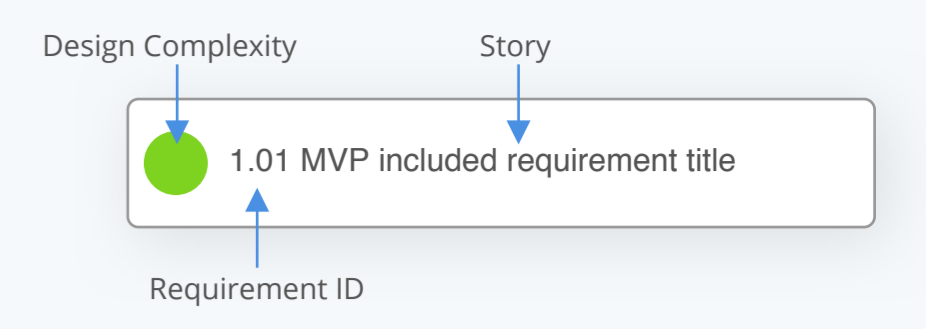


**Legend / Key**

**Design Complexity**

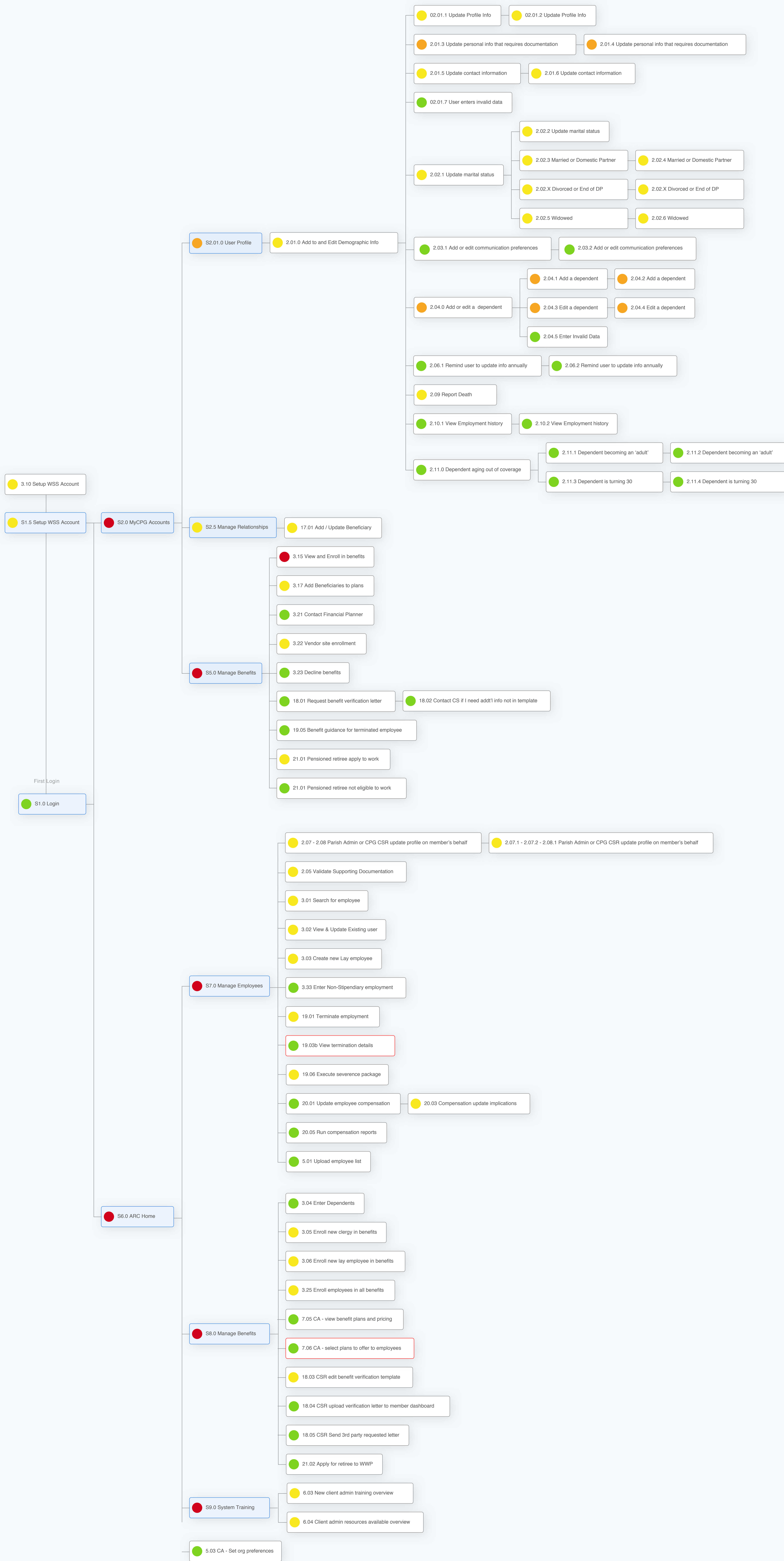
- Easy
- Moderate
- Complex
- Difficult

**Requirement Diagrams**



**Requirement Implementation Status**

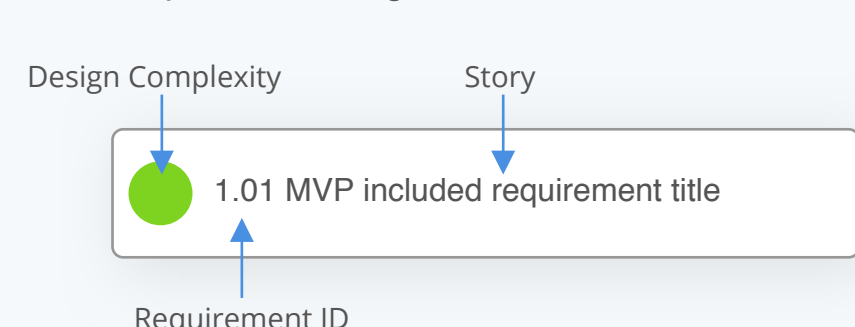
- 1.01 MVP included requirement title: Included in MVP
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- 1.01 Requirement with LEGAL issues: LEGAL issues with requirement
- 2.05 Add/Edit dependent, 3.14 Enter Dependents: Duplicate Requirements



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Screen Implementation

