

Five Duty Paths Overview

Purpose: A guide to the five lanes used to organize resources and review reminders.

At a glance

- Resource type: Guide
- Resource category: Five Duty Paths
- Review sensitivity: standard

How the five duty paths work

The five duty paths organize resources by operating question, not by live task ownership. Use the lanes to route materials, identify review needs, and retain evidence.

Duty path lane board

Duty path	Use it for	Common evidence
Strategy & Plan Design	Design assumptions, classes, contribution strategy, approvals	Design memo, approval record, reviewer notes
Finance & Funding	Funding, payroll, reimbursement assumptions, reconciliation	Contribution model, invoices, variance notes
Operations & Implementation	Eligibility, vendor setup, data, handoffs, launch readiness	Eligibility file, data delivery proof, vendor scope source
Compliance & Governance	Qualified review, notices, privacy, reporting, audit evidence	Notice log, approved language, source reference
Employee Experience	Employee support, FAQ cards, enrollment and communication routing	FAQ version, support path, distribution record

Checklist

- Name the duty path before choosing a resource.
- Check whether the resource touches qualified review areas.
- Use the duty path to identify evidence that should be retained.
- Avoid treating a duty path as a task assignment or status tracker.

Review triggers

- Legal, tax, privacy, Medicare, claims, payroll, or state-specific interpretation.
- Employee-specific eligibility, affordability, reimbursement, or coverage outcome.
- Contract, vendor scope, or notice delivery commitment.

Evidence examples

- Selected resource lane
- External SOW or review record if used

Reminder

This toolkit provides educational and operating-model resources. It does not assign responsibility, manage implementation tasks, replace plan documents, or provide legal, tax, payroll, Medicare, carrier, or individualized benefits advice.

Use this when

- You need to explain how HRB resources are grouped.

Watch for

- Language that sounds like live task ownership or workflow status.

Evidence to retain

- Selected resource lane
- External SOW or review record if used

Related resources

- HRB Operating Lens
- ICHRA Ecosystem SOW Template
- Role Code Reference
- Partner Coverage Diagnostic
- Employer Discovery Intake

Educational disclaimer

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