

# Role Code Reference

Purpose: Reference cards for ecosystem role abbreviations and responsibility-code language.

## At a glance

- Resource type: Reference
- Resource category: SOW + Scope Tools
- Review sensitivity: standard

## Role code quick reference

Role code	Role	Typical evidence
ER	Employer / Plan Sponsor	Employer approval, plan decision record
HR	Employer HR	Eligibility direction, communication approval
FIN	Finance / Payroll	Funding, payroll, reconciliation evidence
L	Legal / Compliance Counsel	Review notes, approved language
ESP	Employer-side broker / consultant	Scope source, advisory notes
IFP	Individual market broker	Enrollment support scope
EIV	Enrollment and illustration vendor	Data intake, illustration record
PV	Payment / reimbursement vendor	Payment or substantiation record
CV	Compliance vendor	Notice, reporting, source support

## Responsibility code guide

Code	Meaning	Boundary
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A	Accountable / Final Approver	Final employer-side approval must be documented.
L	Lead / Primary Lane	Coordinates the function in the external scope record.
S	Support / Contributor	Supports the lead lane with scoped inputs.
R	Review / Approve	Reviews specialized questions before use.
I	Informed	Receives information only.
E	Excluded / Not in Scope	Not included unless separately documented.

### Checklist

- Use role codes only with an external scope record.
- Do not use role codes to create live assignment tracking.
- Pair every code with evidence, source, or approval notes.
- Escalate responsibility shifts for qualified review where needed.

### Review triggers

- Language that implies live assignment tracking or transfers responsibility without documentation.

### Evidence examples

- External scope source
- Review notes
- Role map

### 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 careful language for roles in an external SOW or exported record.

### Watch for

- Language that implies live assignment tracking or transfers responsibility without documentation.

### Evidence to retain

- External scope source
- Review notes
- Role map

### Related resources

- HRB Operating Lens
- Five Duty Paths Overview
- ICHRA Ecosystem SOW Template
- Partner Coverage Diagnostic
- Employer Discovery Intake

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