Member Services: fields requested in Relay

Stage 4 evidence

Open only after your initial recommendation (Stage 3) is complete.

Source: Member Services operations lead, forwarded by Samira Haddad **Date:** 2026-10-21 **Status:** Requested configuration for go-live, not yet enabled

Support leadership asked for these fields on Member Services tickets and on exported **chat transcripts** stored as ticket comments:

Field / content	Example of what agents say they receive today (in the current mailbox tool)
Member name	Name the person gives on the call or chat
Member ID	Harborline member number, when the person has one
Date of birth	Sometimes given to verify identity
Dates of service	"My visit last Tuesday" / a date the member states
Billing and benefits questions	Deductible, coverage, denied claim
Care-navigation notes	The member's description of a clinical issue, symptoms, or a care-team instruction they want explained
Chat transcript	Full text of the chat, including the member's words
Attachments	Screenshots of EOBs or portal messages the member sends

Member Services currently stores this in a mailbox-plus-spreadsheet process. They describe Relay as "not the EHR, just the conversation."

Harborline Legal / Privacy has **not** issued a classification memo for this dataset in Relay. No DPIA / PIA for Member Services-in-Relay is in this packet.

The draft DPA language in the Assess packet described **employee support data**. This request is not in that description.