

Centers for Medicare & Medicaid Services

EDGE Server Truncation Request

User Guide

September 2019

Table of Contents

Resources 1
1 Introduction 1
2 EDGE Truncation Page 2
3 Welcome Page 4
4 Contact Information Page 5
5 EDGE Server Truncation Request Type Page 7
6 New EDGE Server Truncation Request 9
6.1 New EDGE Server Production Zone Truncation Request Page 9
6.2 New EDGE Server Test/Validation Zone Truncation Request Page 16
7 EDGE Server Truncation Extension Request 21
8 Summary Page 26
9 Confirmation Page 29

Resources

The following EDGE server truncation request resources are available for review or download:

- EDGE Server Truncation Request webinar training materials from the REGTAP library in the Distributed Data Collection for RA/Edge Server Program Area: https://www.regtap.info/reg_librarye.php?i=3015

1 Introduction

Issuers submitting EDGE server data for the Risk Adjustment program can submit a request for truncation of the data submitted for the active benefit year. The Centers for Medicare & Medicaid Services (CMS) has developed the EDGE Server Truncation Request web form to allow issuers to request an EDGE server truncation or an extension for a previously approved truncation request. CMS reviews truncation and truncation extension requests, then provides notification and instructions to issuers.

Truncation is a data purging process issuers can perform to delete enrollee, medical claim, pharmacy claim, and supplemental diagnosis data from their EDGE servers.

The EDGE Server Truncation Request web form resides in the FM Community. Only FM Community users can access the web form to submit a truncation request. Truncation can be requested for any of the three zones on the EDGE sever: Production, Test, and Validation.

- Production: Issuers must request a new script each time. CMS must approve each request and issue a new script.
- Validation: Issuers must request the initial script for each benefit year. CMS must approve the request and the issuer can re-use the script throughout the benefit year.
- Test: Issuers must request the initial script for each benefit year. CMS must approve the request and the issuer can re-use the script throughout the benefit year.

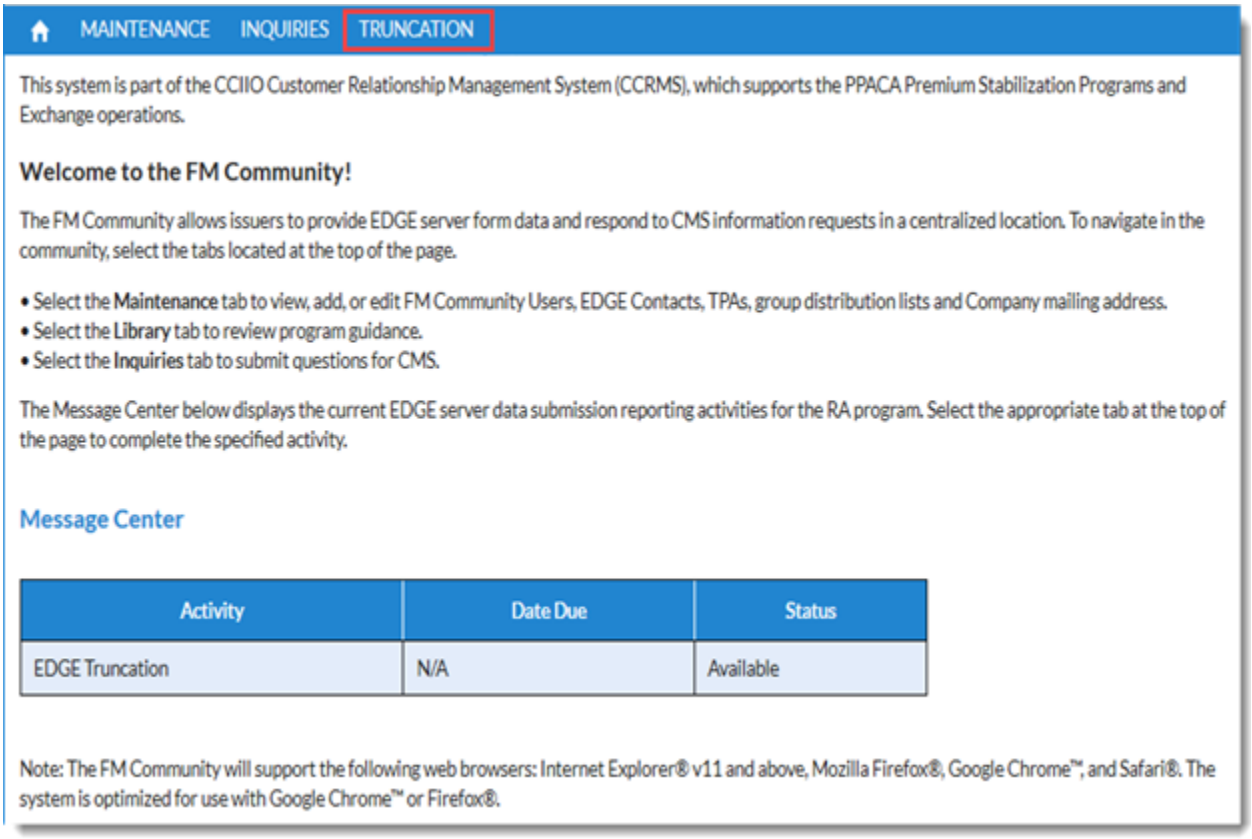
CMS updated the truncation request process to allow issuers to request a complete truncation for a specific zone to delete data across all issuer tables **or** to request to a file type truncation for a specific zone to delete data based on file type (e.g., enrollment claims, medical claims including supplemental records, or pharmacy claims) within the requested zone. EDGE truncation commands will delete all issuer tables except EDGE Server Common Schema Data Tables.

This document is a step-by-step guide to access, complete, and submit the EDGE Server Truncation Request form.

2 EDGE Truncation Page

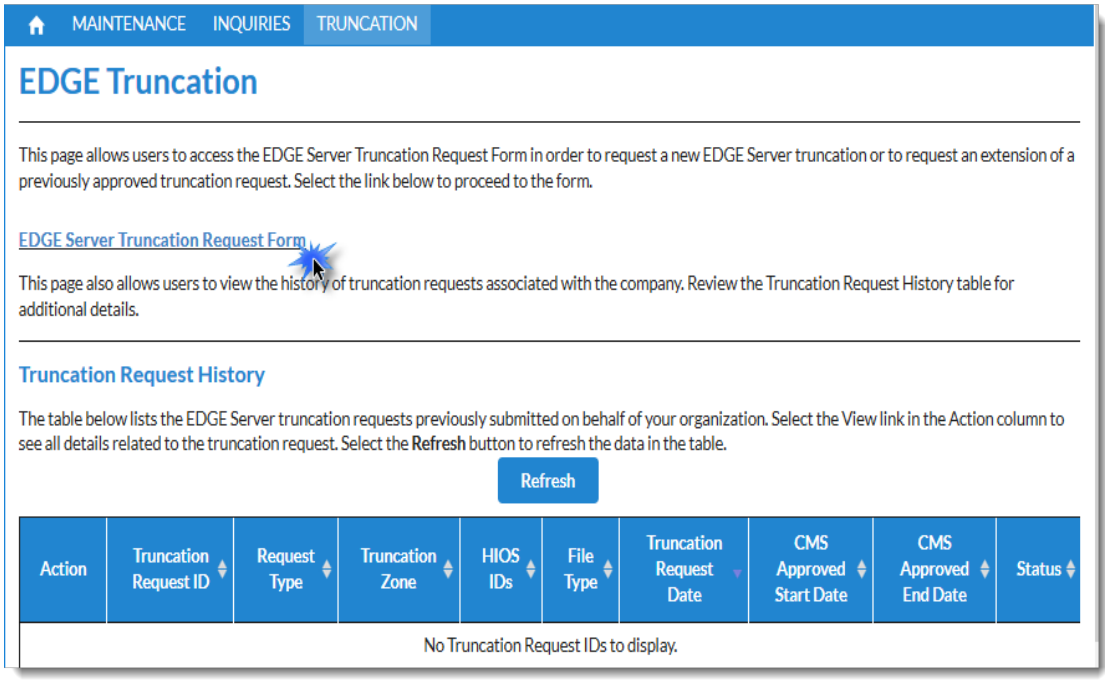
The *EDGE Truncation* page, located on the *Truncation* tab, allows issuers to access the EDGE Truncation Form and to view previously submitted truncation requests. To access the *EDGE Truncation* page, log into FM Community and select the *Truncation* tab.

Figure 1: Truncation Tab



To navigate to the EDGE Server Truncation Request Form, select the link on the *EDGE Truncation* page.

Figure 2: EDGE Server Truncation Request Form Link



The Truncation Request History table lists the EDGE Server truncation requests previously submitted on behalf of your organization during the current benefit year. Select the **View** link in the Action column to see all details related to the truncation request.

Figure 3: Truncation Request History Table

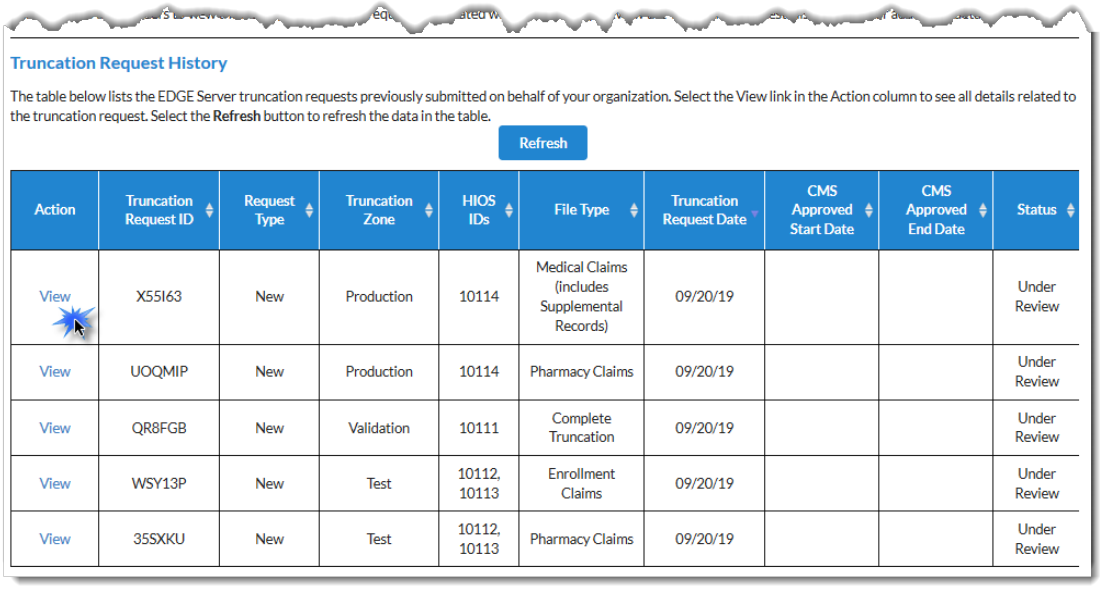
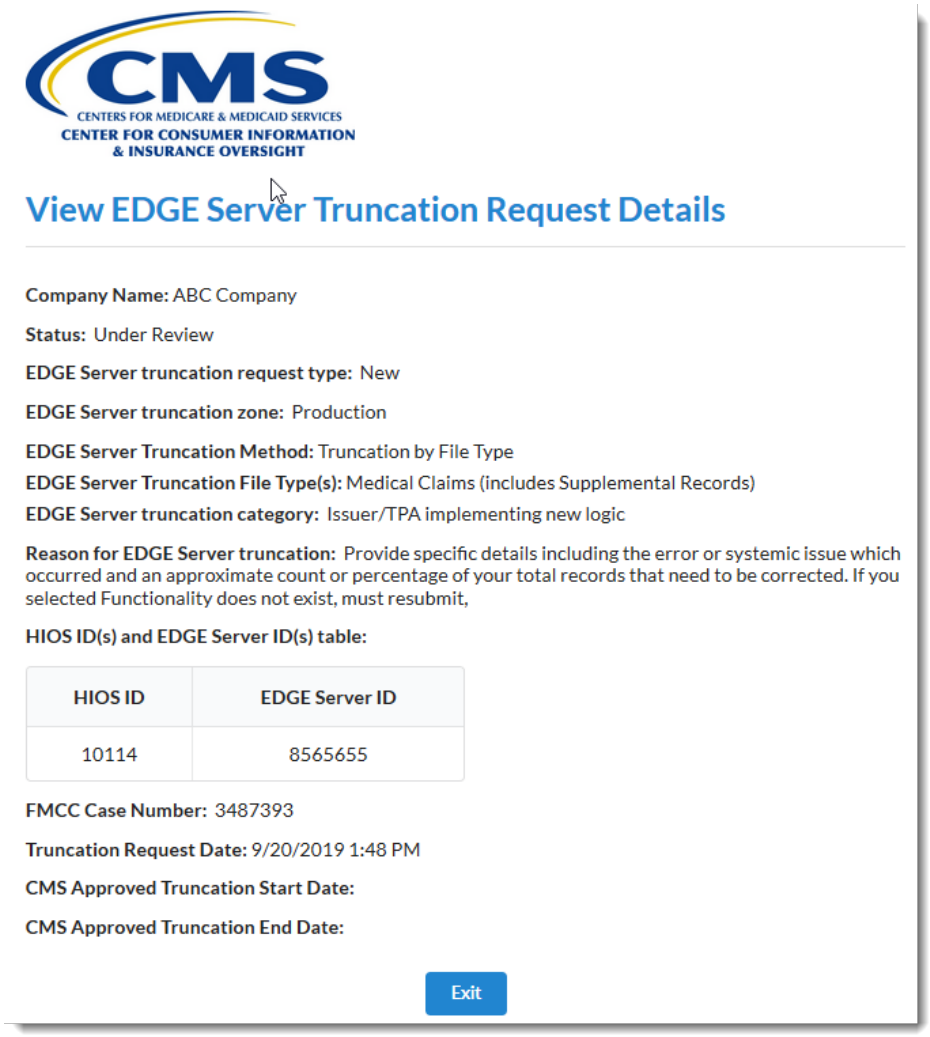


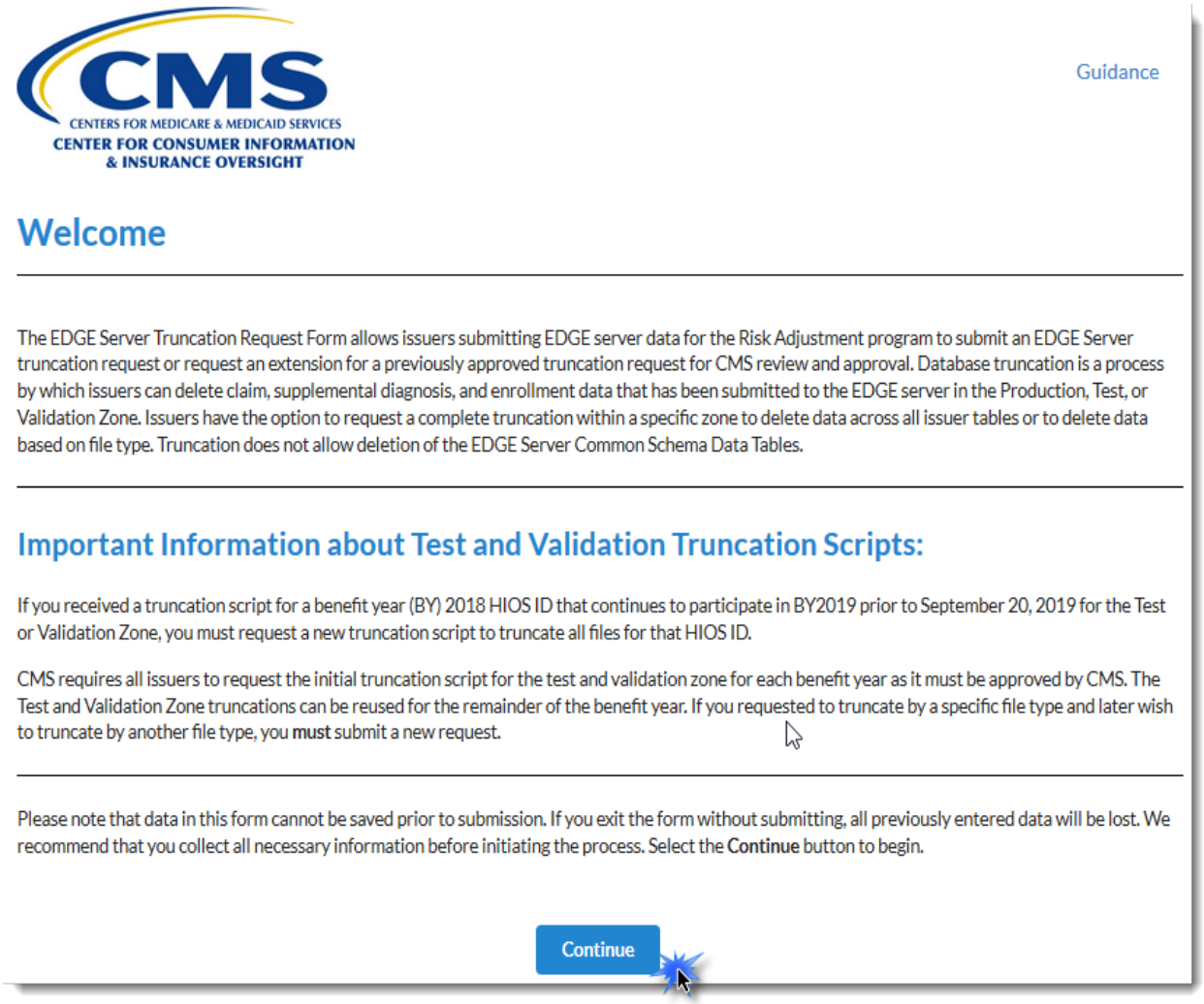
Figure 4: Truncation Request Details



3 Welcome Page

Upon selecting the **EDGE Server Truncation Request Form** link on the *EDGE Truncation* page, the system navigates to the *Welcome* page as shown in Figure 5. Review the instructions and select the **Continue** button to navigate to the *Contact Information* page.

Figure 5: Welcome Page



4 Contact Information Page

The *Contact Information* page collects Truncation Request Contact information.

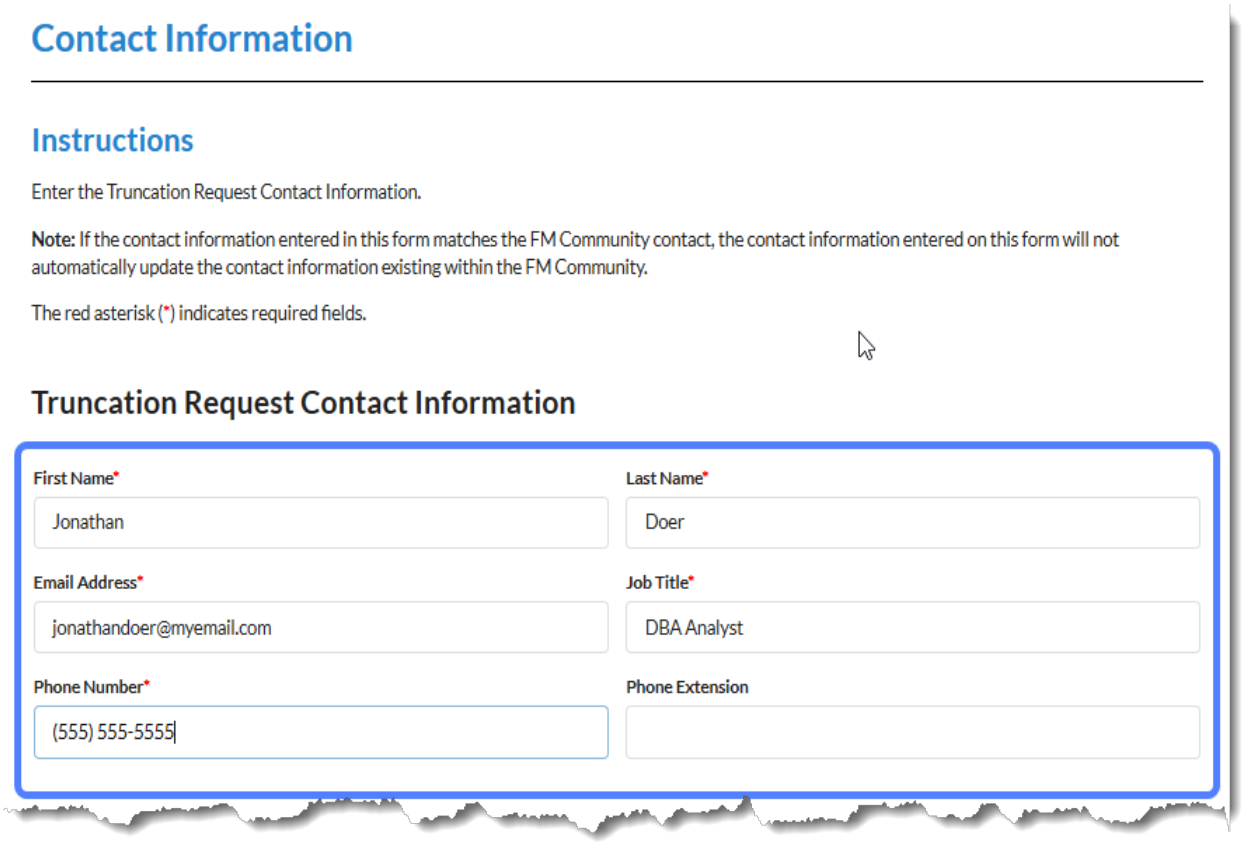
Note: If the contact information entered in this form matches the FM Community contact, the contact information entered on this form will not automatically update the contact information on the FM Community Maintenance tab.

Follow these steps to complete the *Contact Information* page:

1. Enter the Truncation Request contact information:
    - First Name

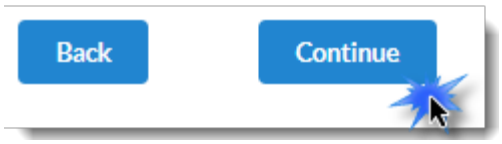
- Last Name
- Email Address
- Job Title
- Phone Number
- Phone Extension (optional)

Figure 6: Truncation Request Contact Information



2. Select the **Continue** button. You will be directed to the *EDGE Server Truncation Request Type* page of the form.

Figure 7: Continue Button

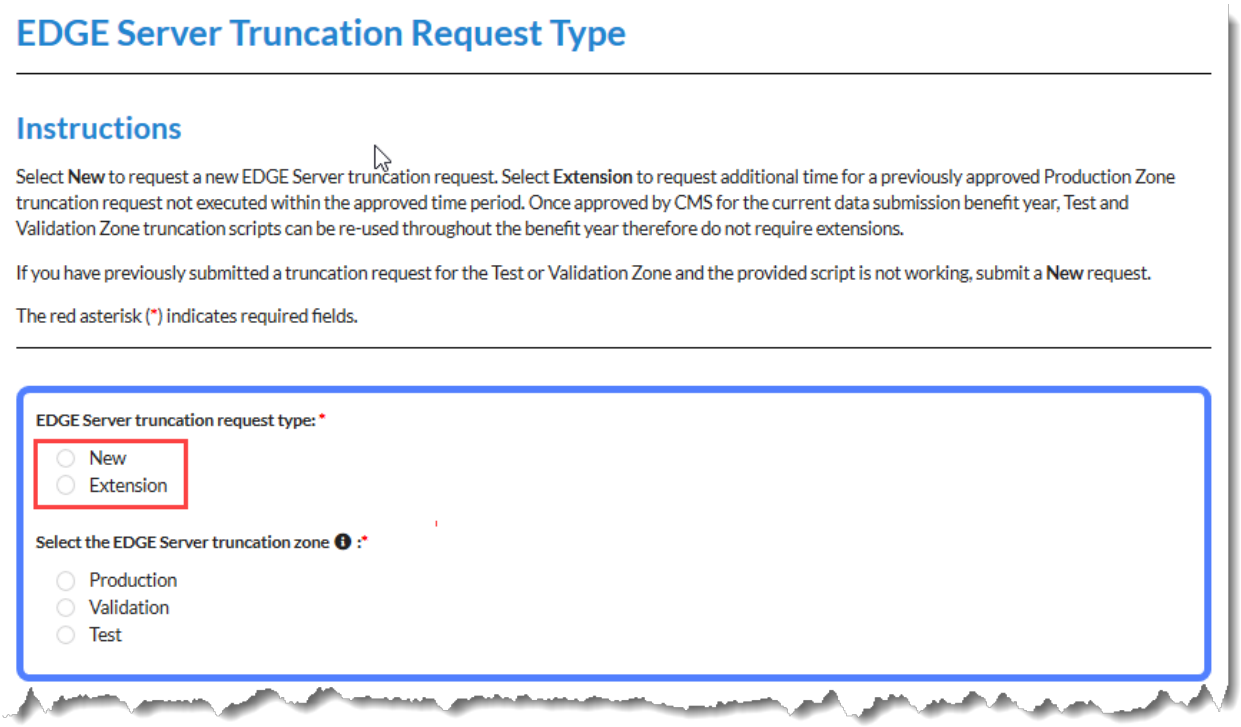


5 EDGE Server Truncation Request Type Page

The *EDGE Server Truncation Request Type* page provides the option to make a new request for EDGE server truncation for any zone, or to request an extension for a previously approved truncation request in the Production Zone.

1. Select the EDGE Server Truncation Request type.

Figure 8: Truncation Request Type

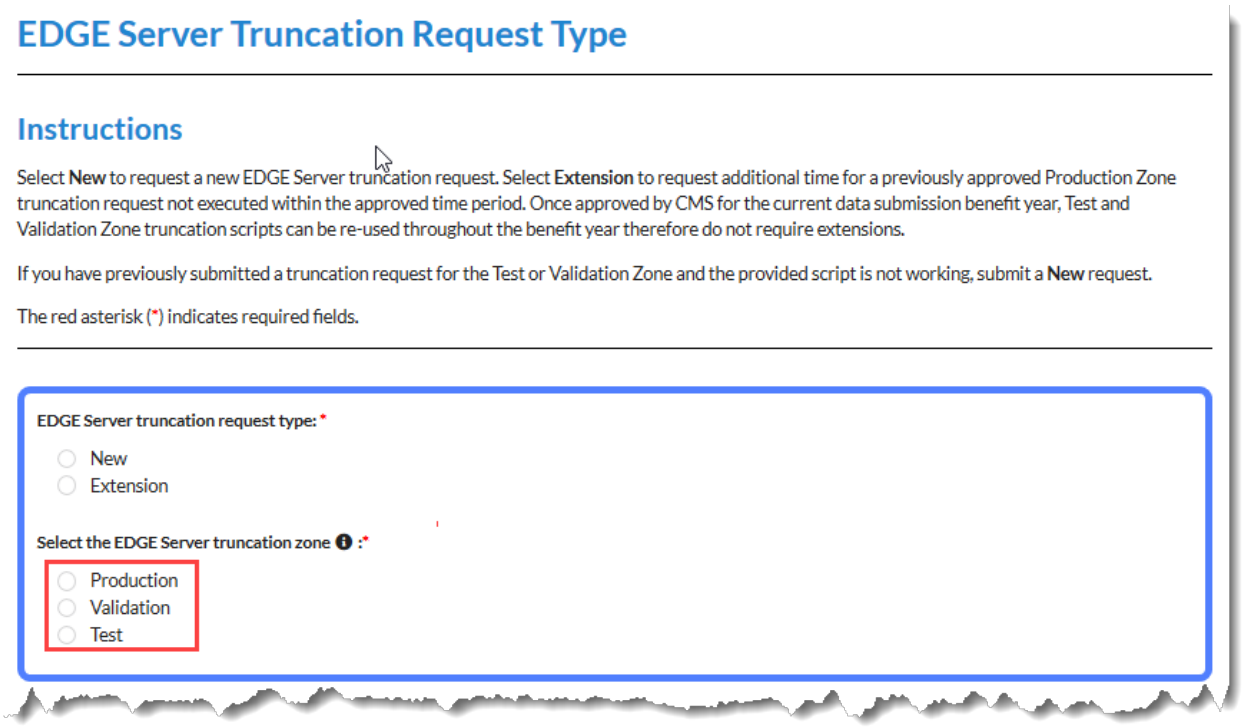


Note: An EDGE server truncation extension request may be made for a previously approved truncation request that has not been executed and has not expired. If your previously approved truncation request has expired, you must submit a new EDGE server truncation request.

2. Select the EDGE Server Truncation zone.

Note: The Test and Validation Zone options will be disabled if you choose an extension request as extensions are not applicable for the Test or Validation Zone.

Figure 9: Truncation Request Type



3. Select the **Continue** button to navigate to the next page in the form. Refer to Table 1 for system navigation.

Figure 10: Continue Button



Table 1: EDGE Server Truncation Request Type

If	Then
You made a new truncation request,	Refer to Section 6.
You requested to extend a previously approved truncation request,	Refer to Section 7.

6 New EDGE Server Truncation Request

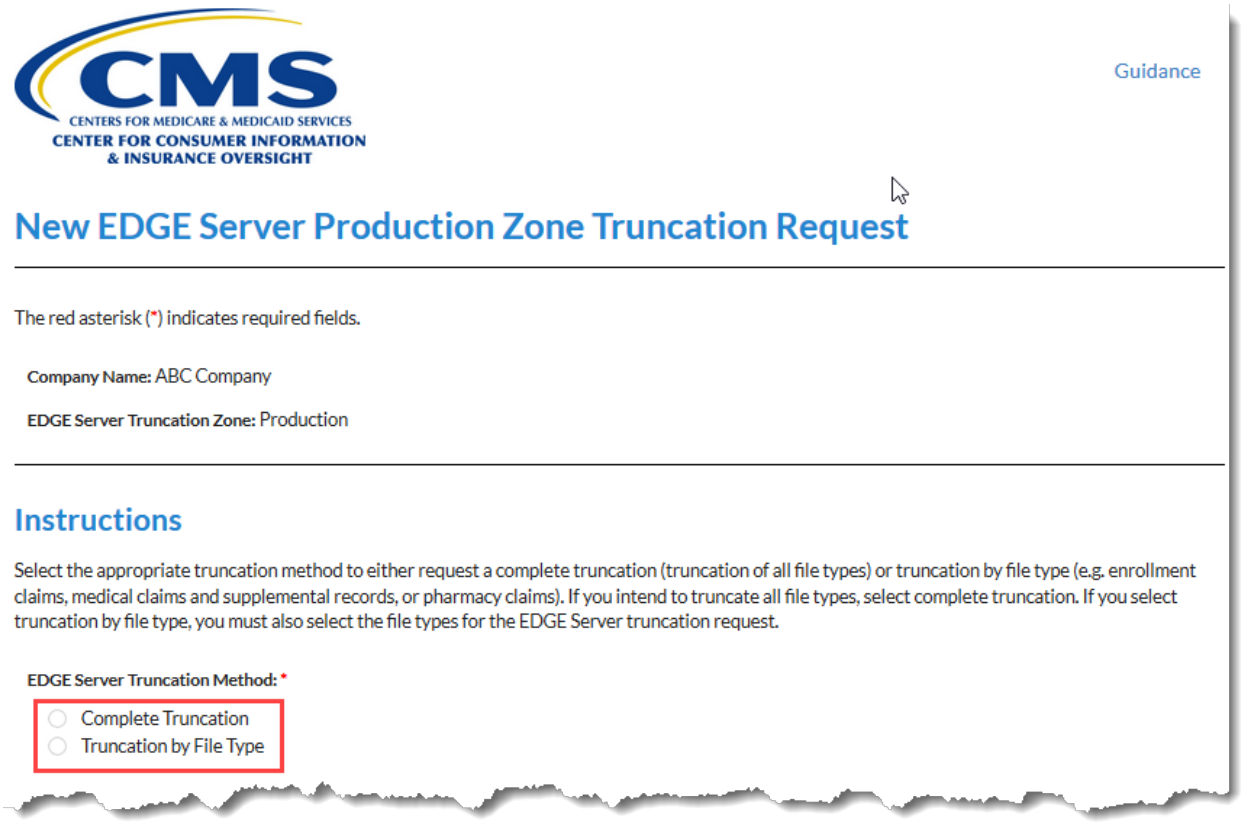
This section provides instructions on how to make a new request for EDGE server truncation. To make a new truncation request for the Production zone, proceed to Section 6.1. To make a new truncation request for the Test or Validation zone, proceed to Section 6.2.

6.1 New EDGE Server Production Zone Truncation Request Page

The *New EDGE Server Production Zone Truncation Request* page collects information related to the type of and reasoning behind your Production Zone truncation request. Follow these steps to complete the *New EDGE Server Production Zone Truncation Request* page:

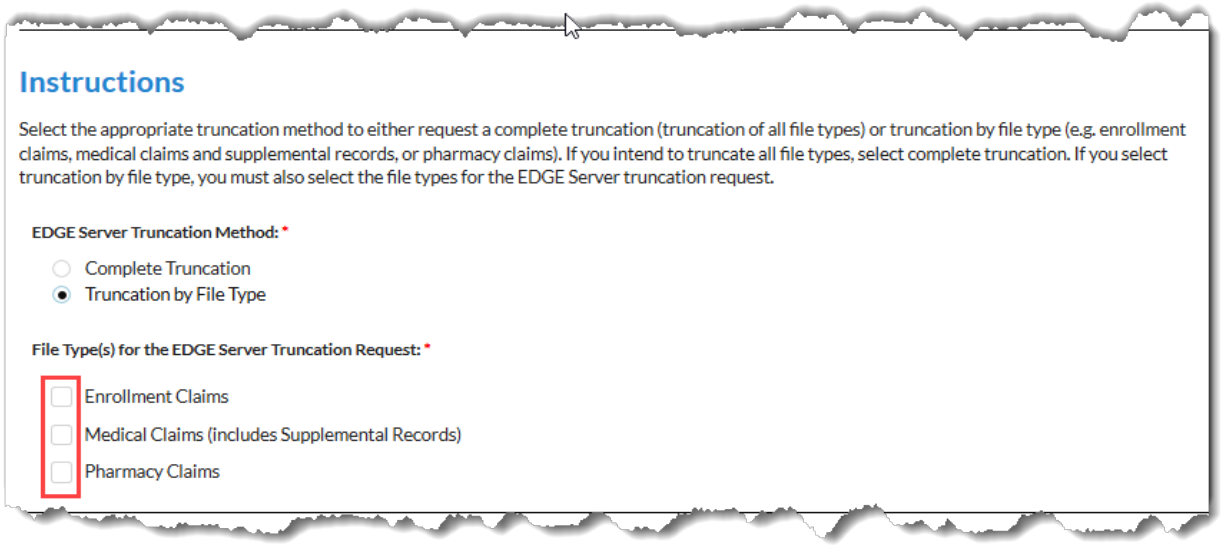
1. Select the truncation method to request a complete truncation (truncation of all file types) or truncation by file type.

Figure 11: Truncation Method Radio Buttons



2. If you chose to truncate by file type, select the appropriate truncation file type option(s) (e.g., enrollment claims, medical claims and supplemental records, or pharmacy claims). You may choose a maximum of two file types.

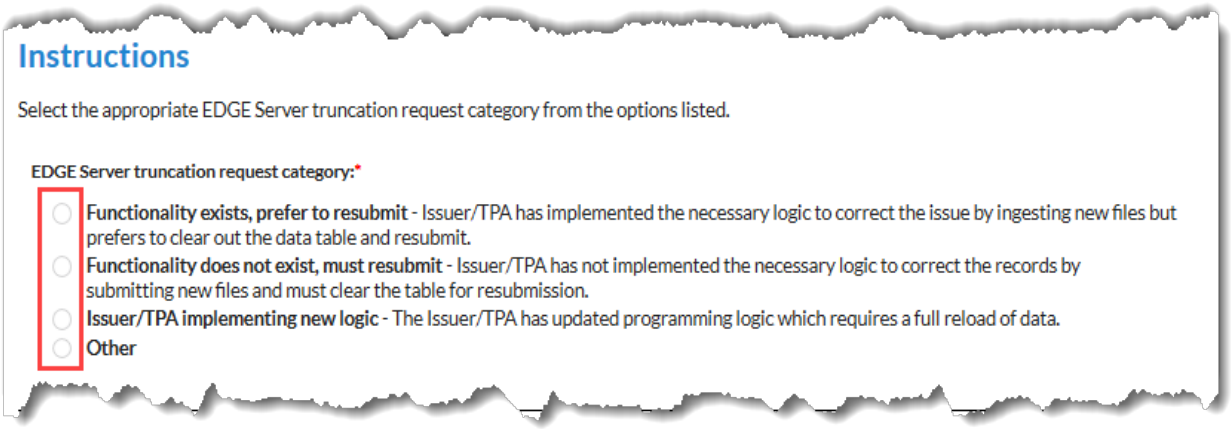
Figure 12: File Types for Truncation Request



Note: If you requested to truncate by a specific file type and later wish to truncate by another file type for the same HIOS ID(s), you must submit a new request.

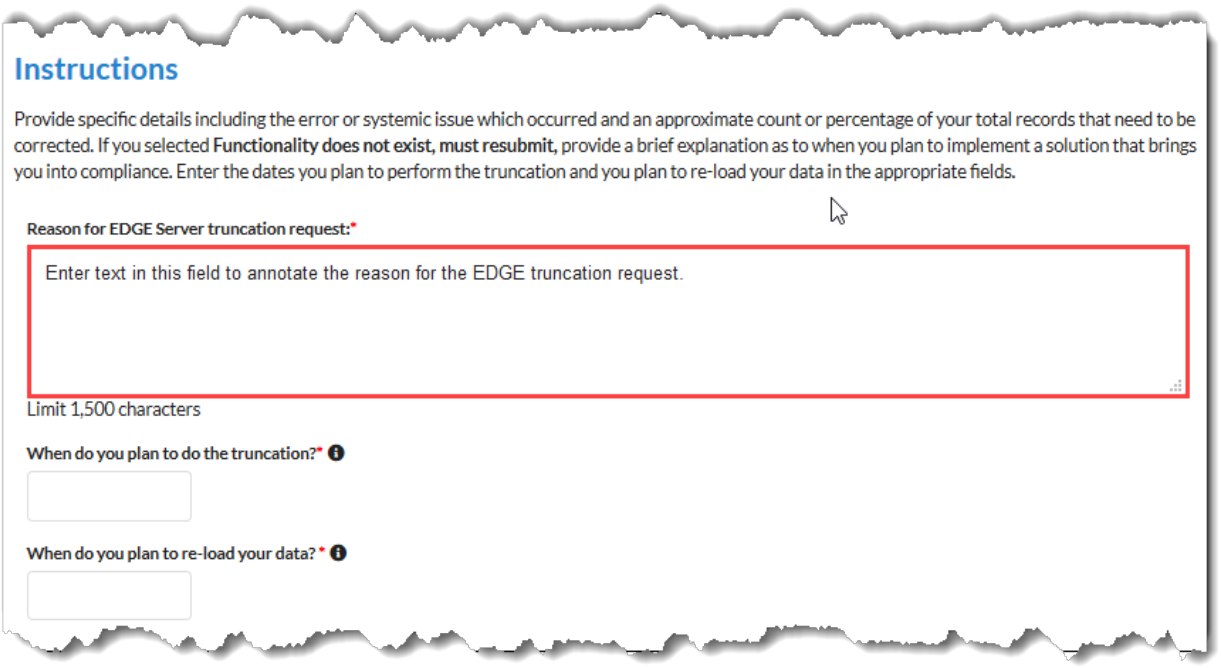
3. Select the appropriate EDGE Server truncation request category from the options listed:
    - ***Functionality exists, prefer to resubmit*** - Issuer/TPA has implemented the necessary logic to correct the issue by ingesting new files but prefers to clear out the data table and resubmit.
    - ***Functionality does not exist, must resubmit*** - Issuer/TPA has not implemented the necessary logic to correct the records by submitting new files and must clear the table for resubmission.
    - ***Issuer/TPA implementing new logic*** - The Issuer/TPA has updated programming logic, which requires a full reload of data.
    - ***Other***

Figure 13: Truncation Request Category Selection



4. Enter the reason for your truncation request, including specific details regarding the type of data affected (enrollment, medical claims, pharmacy claims, supplemental records), and an approximate count or percentage of your total records that need to be corrected in the Reason for EDGE Server truncation request field. This field has a limit of 1,500 characters.

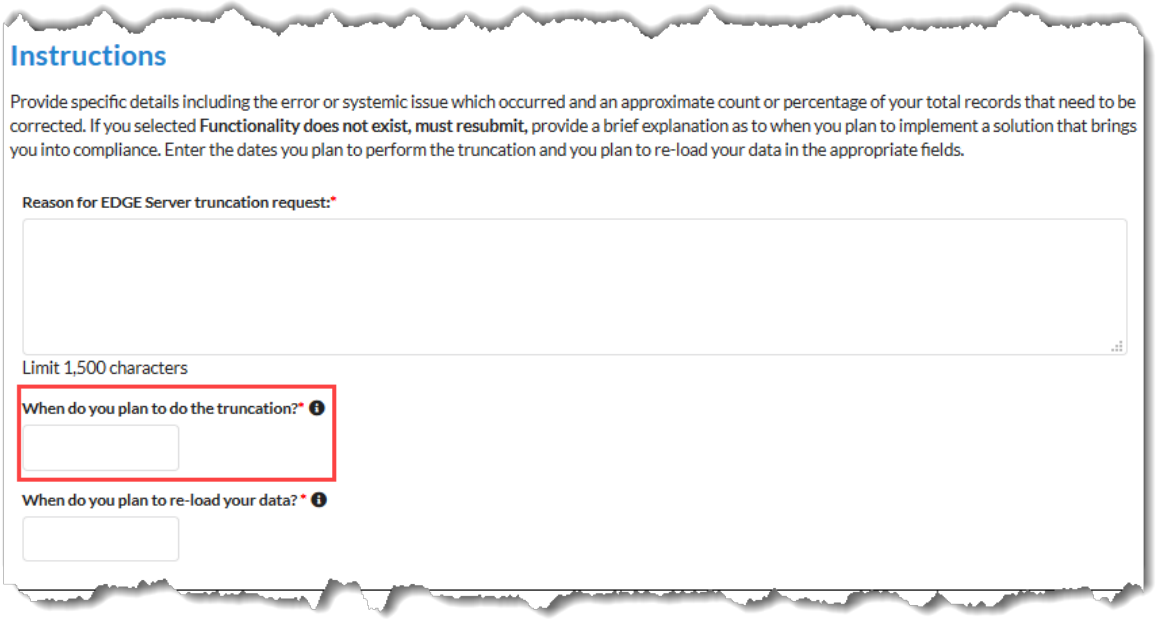
Figure 14: Truncation Request Reason



Note: If you selected the *Functionality does not exist, must resubmit* radio button (see Step 3), provide a brief explanation as to when you plan to implement a solution that brings you into compliance.

5. Enter the planned truncation date in the ***When do you plan to do the truncation?*** field.

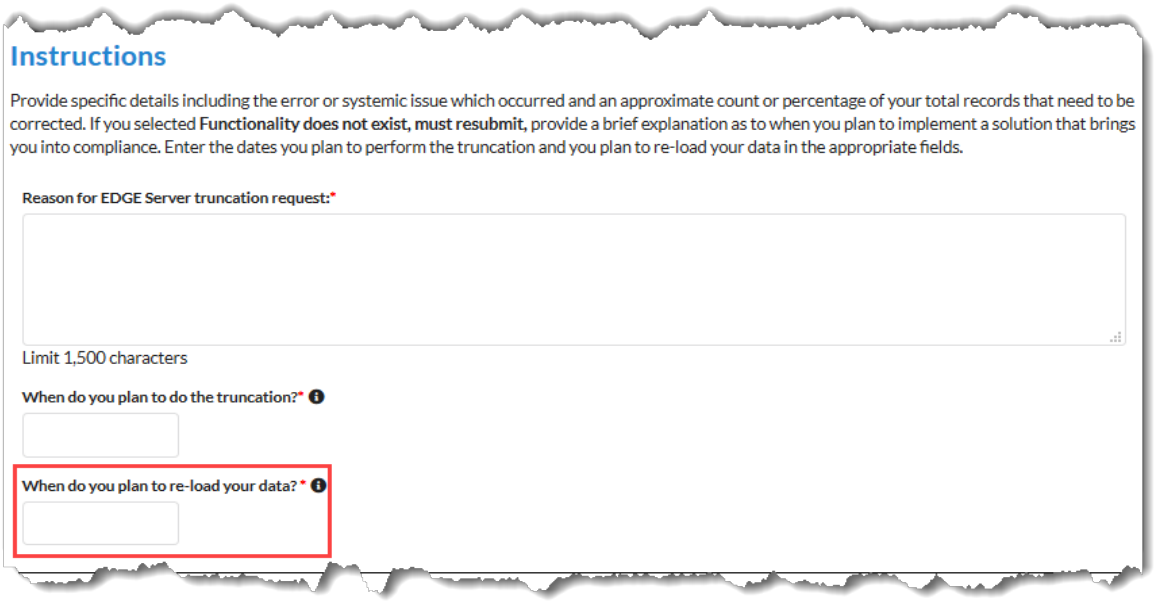
Figure 15: Planned Truncation Date



Note: This date must be at least one business day from today's date.

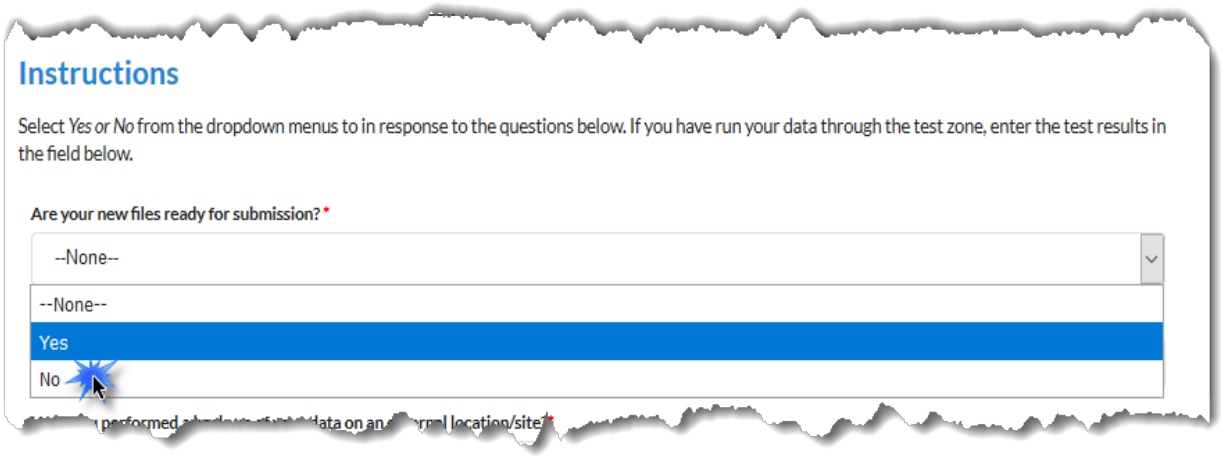
6. Enter your planned re-load date in the ***When do you plan to re-load your data?*** field. This date must be greater than or equal to the planned truncation date.

Figure 16: Planned Re-load Data Selection



7. Select Yes or No from the ***Are your new files ready for submission?*** dropdown list.

Figure 17: Files Ready for Submission Selection



8. Select Yes or No from the ***Have you run your data through the test zone?*** dropdown list. If you select Yes, enter the test results in the required field.

Figure 18: Data Test Selection

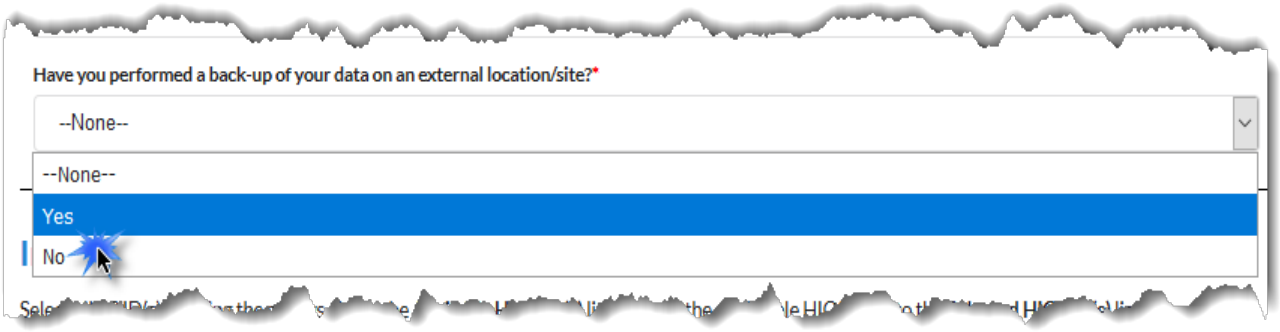


Figure 19: Data Test Selection



9. Select Yes or No from the ***Have you performed a back-up of your data on an external location/site?*** dropdown list.

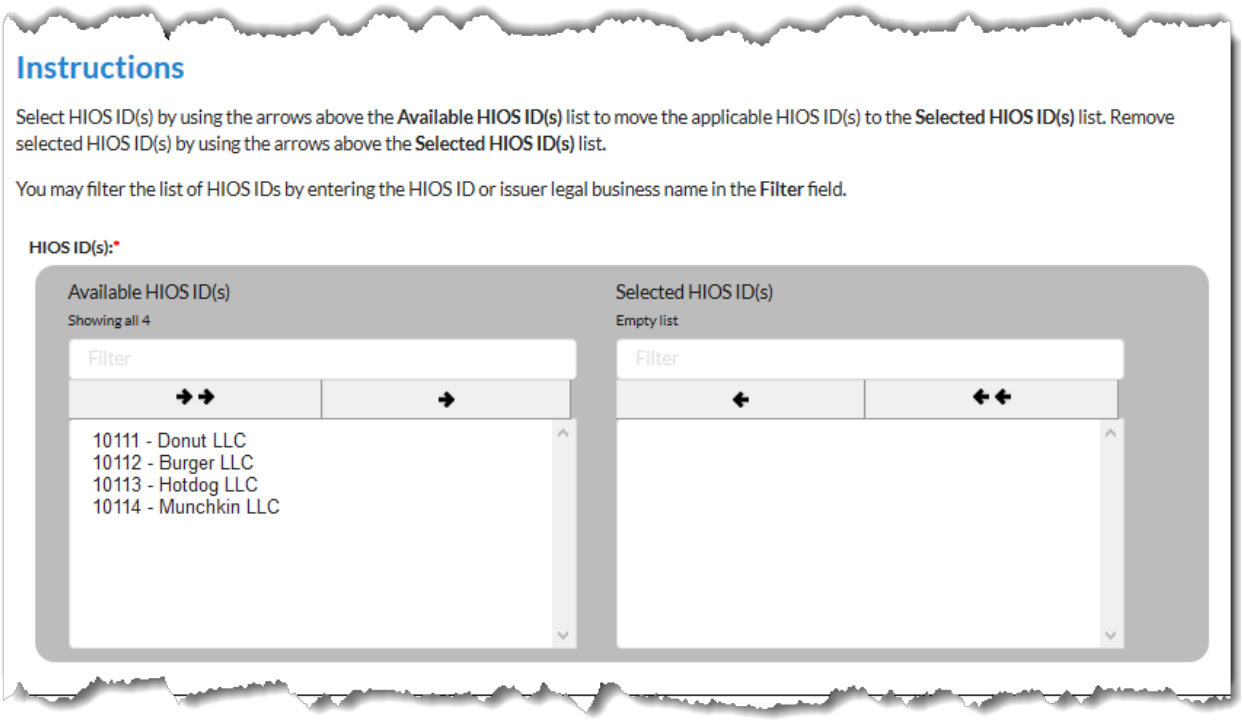
Figure 20: Data Back-up Selection



10. Select the HIOS ID(s) for which you wish to request the EDGE server truncation from the Available HIOS ID(s) list. Use the arrows above the Available HIOS ID(s) list to move the applicable HIOS ID(s) to the Selected HIOS ID(s) list. Remove selected HIOS ID(s) by using the arrows above the Selected HIOS ID(s) list.

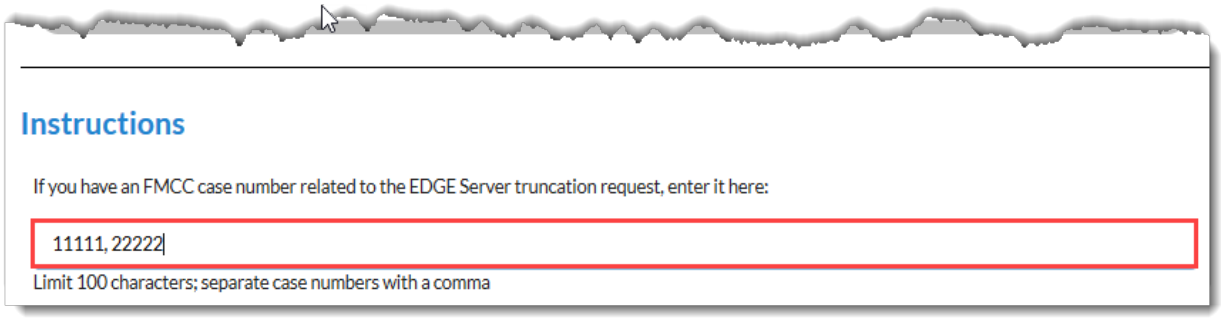
    You may filter the list of HIOS IDs by entering the HIOS ID or issuer legal business name in the Filter field.

Figure 21: HIOS ID Selection



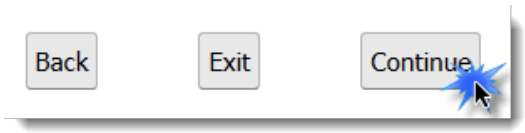
11. Enter any FMCC case numbers, if available, in the ***If you have an FMCC case number related to the EDGE Server truncation request, enter it here*** field. Case numbers must be separated by a comma and the field limit is 100 characters.

Figure 22: FMCC Number Input



12. Select the **Continue** button. The system navigates to the *Summary* page (Section 8) of the form.

Figure 23: Continue Button



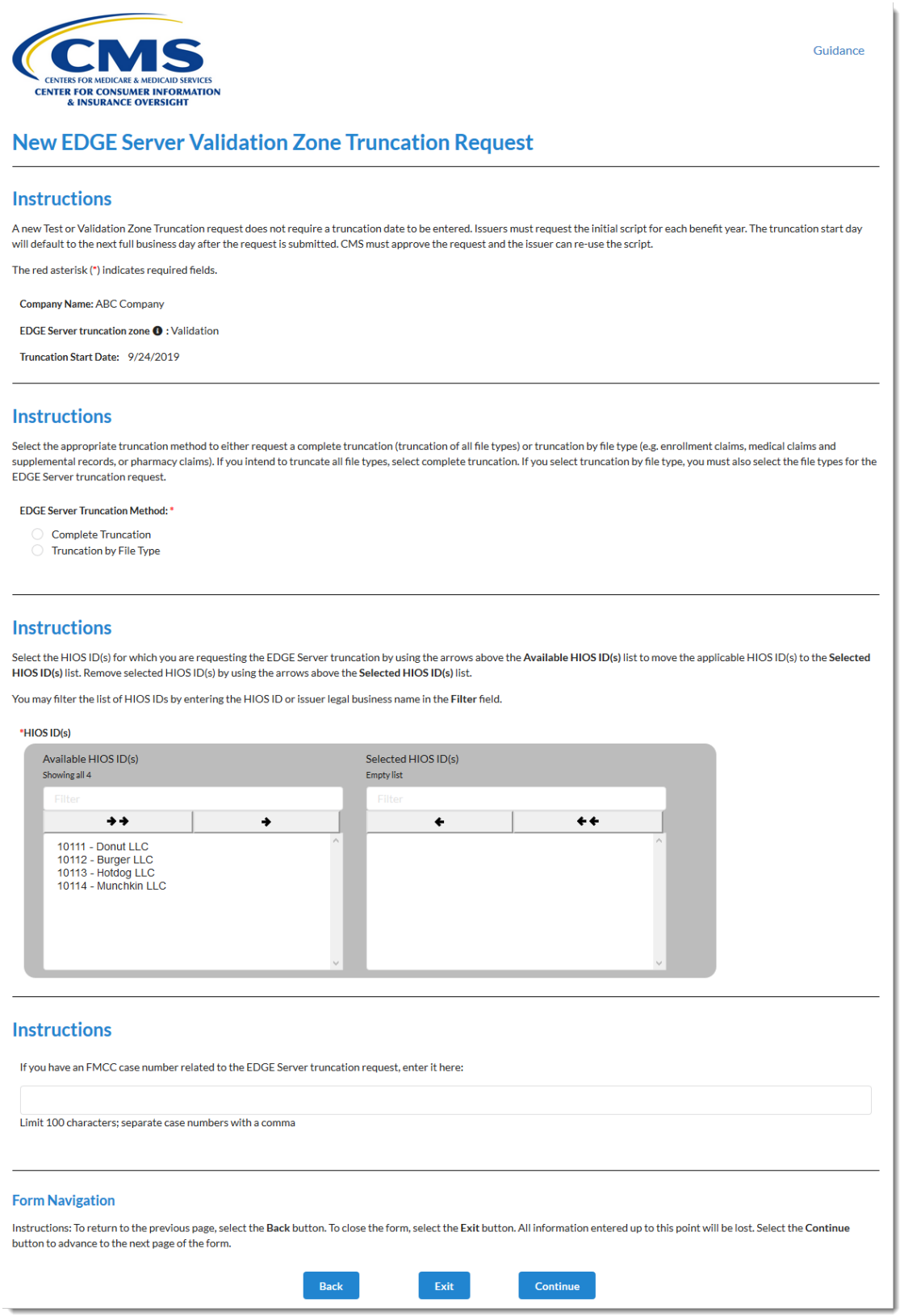
Note: You are able to submit an additional truncation request or truncation extension request from the *Summary* page, if needed.

6.2 New EDGE Server Test/Validation Zone Truncation Request Page

The *New EDGE Server Test/Validation Zone Truncation Request* page collects information related to the type of and reasoning behind your Test/Validation Zone truncation request. Issuers must request a new script for each benefit year. Truncation scripts do not expire, they can be reused as often as needed.

Note: The Company Name, EDGE Server truncation zone, and Truncation Start Date are pre-populated.

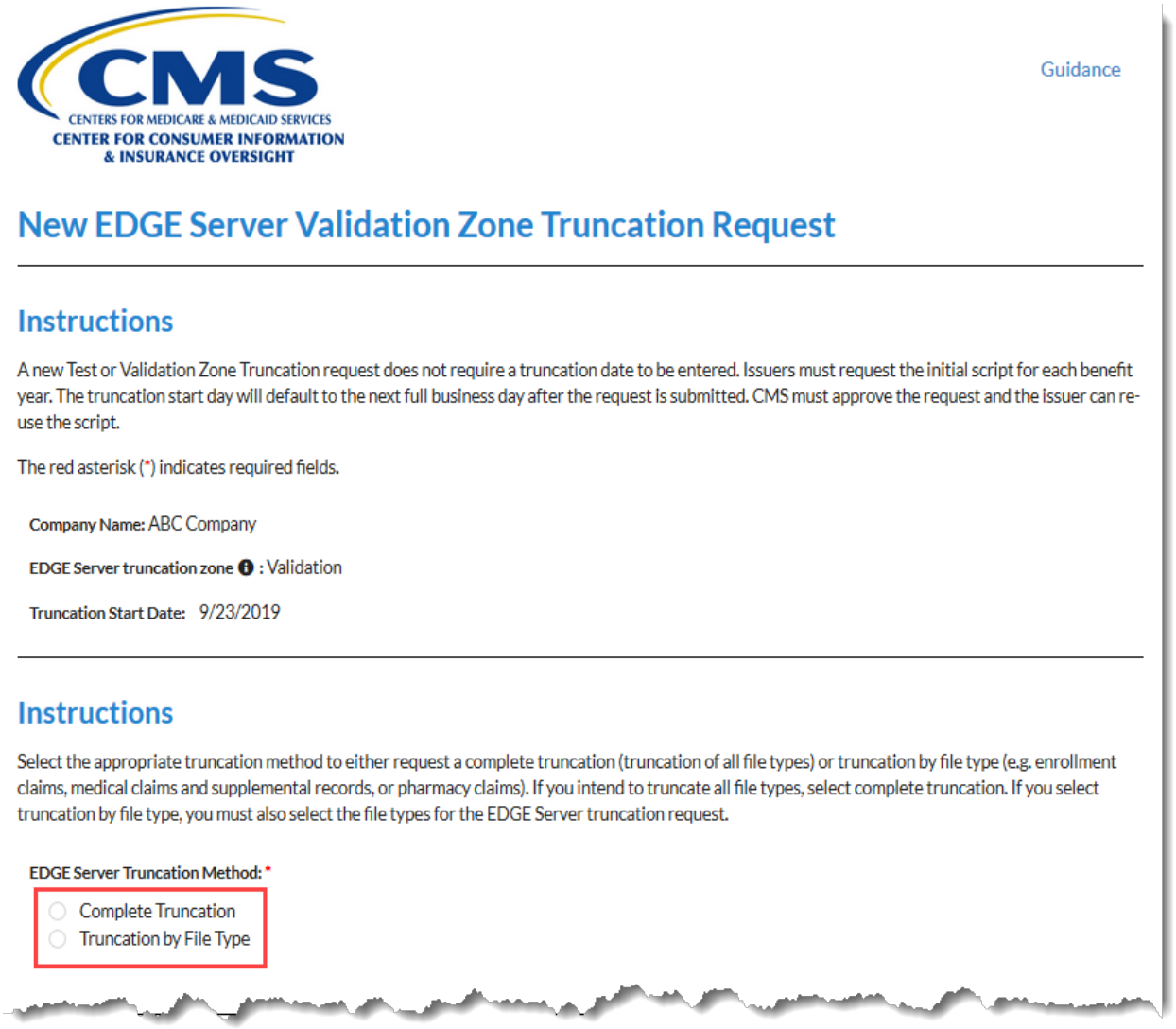
Figure 24: New EDGE Server Validation Zone Truncation Request Page



Follow these steps to complete the *New EDGE Server Test/Validation Zone Truncation Request* page:

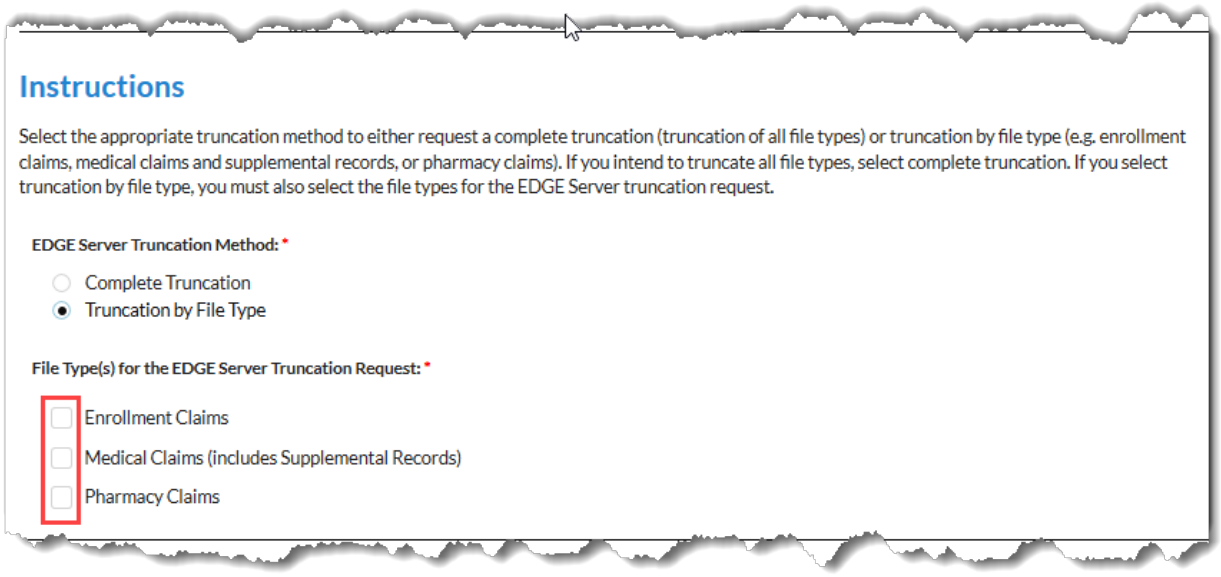
1. Select the truncation method to request a complete truncation (truncation of all file types) or truncation by file type.

Figure 25: Truncation Method Radio Buttons



2. If you chose to truncate by file type, select the appropriate truncation file type option(s) (e.g., enrollment claims, medical claims and supplemental records, or pharmacy claims). You may choose a maximum of two file types.

Figure 26: File Types for Truncation Request

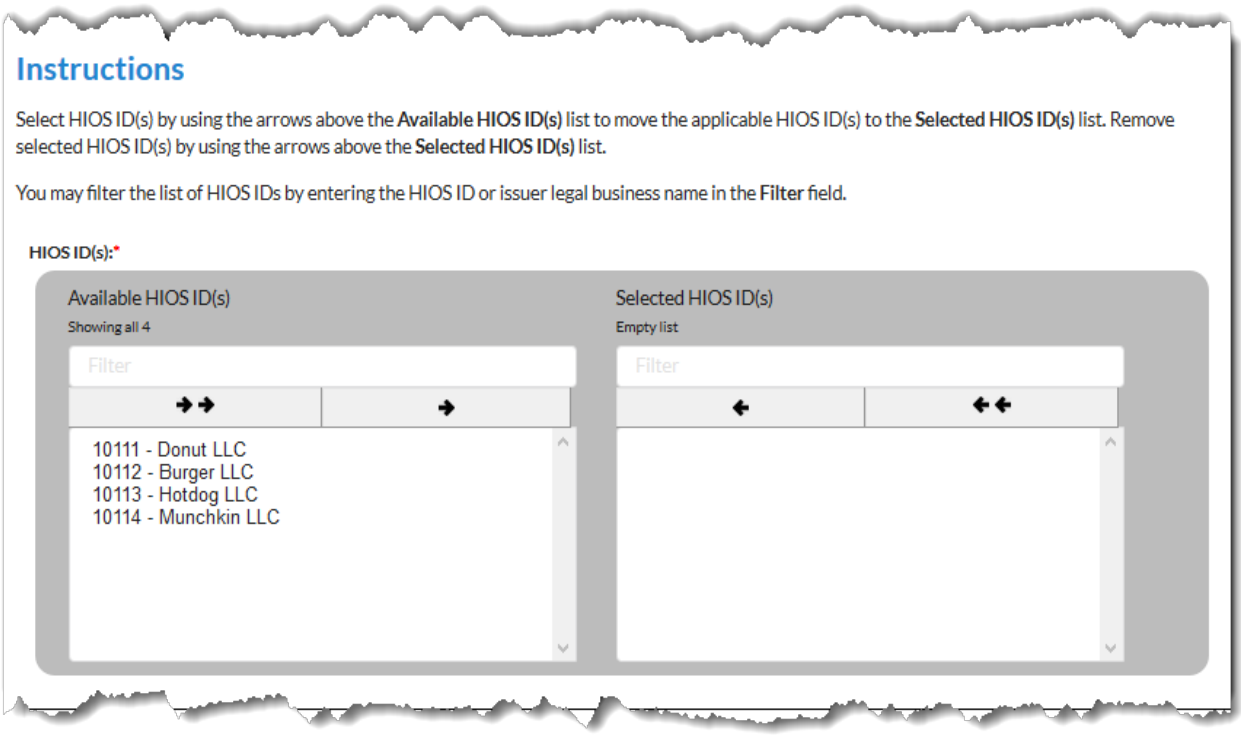


Note: If you requested to truncate by a specific file type and later wish to truncate by another file type for the same HIOS ID(s), you must submit a new request.

3. Select the HIOS ID(s) for which you wish to request the EDGE server truncation from the Available HIOS ID(s) list. Use the arrows above the Available HIOS ID(s) list to move the applicable HIOS ID(s) to the Selected HIOS ID(s) list. Remove selected HIOS ID(s) by using the arrows above the Selected HIOS ID(s) list.

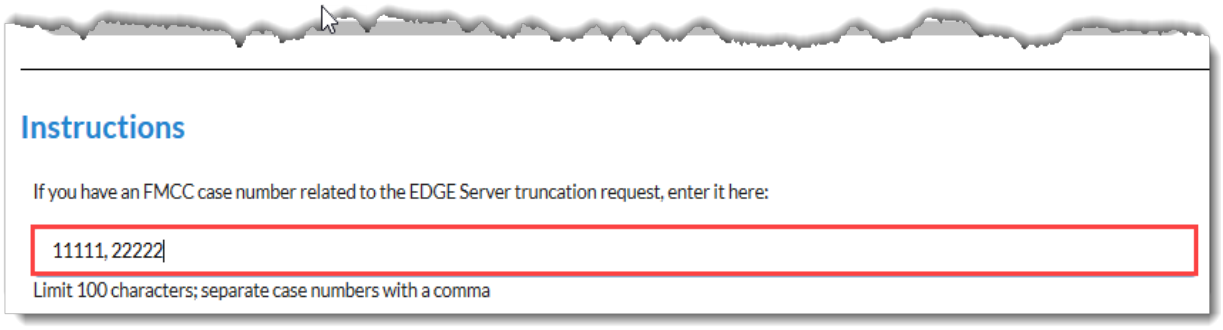
   You may filter the list of HIOS IDs by entering the HIOS ID or issuer legal business name in the Filter field.

Figure 27: HIOS ID Selection



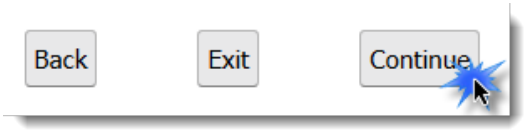
4. Enter any FMCC case numbers, if available, in the ***If you have an FMCC case number related to the EDGE Server truncation request***, enter it here field. Case numbers must be separated by a comma and the field limit is 100 characters.

Figure 28: FMCC Number Input



5. Select the **Continue** button. The system navigates to the Summary page (Section 8) of the form.

Figure 29: Continue Button



Note: You are able to submit an additional truncation request or truncation extension request from the *Summary* page, if needed.

7 EDGE Server Truncation Extension Request

An EDGE Server truncation extension request may be made for a previously approved Production Zone truncation request that has not been executed and has not expired.

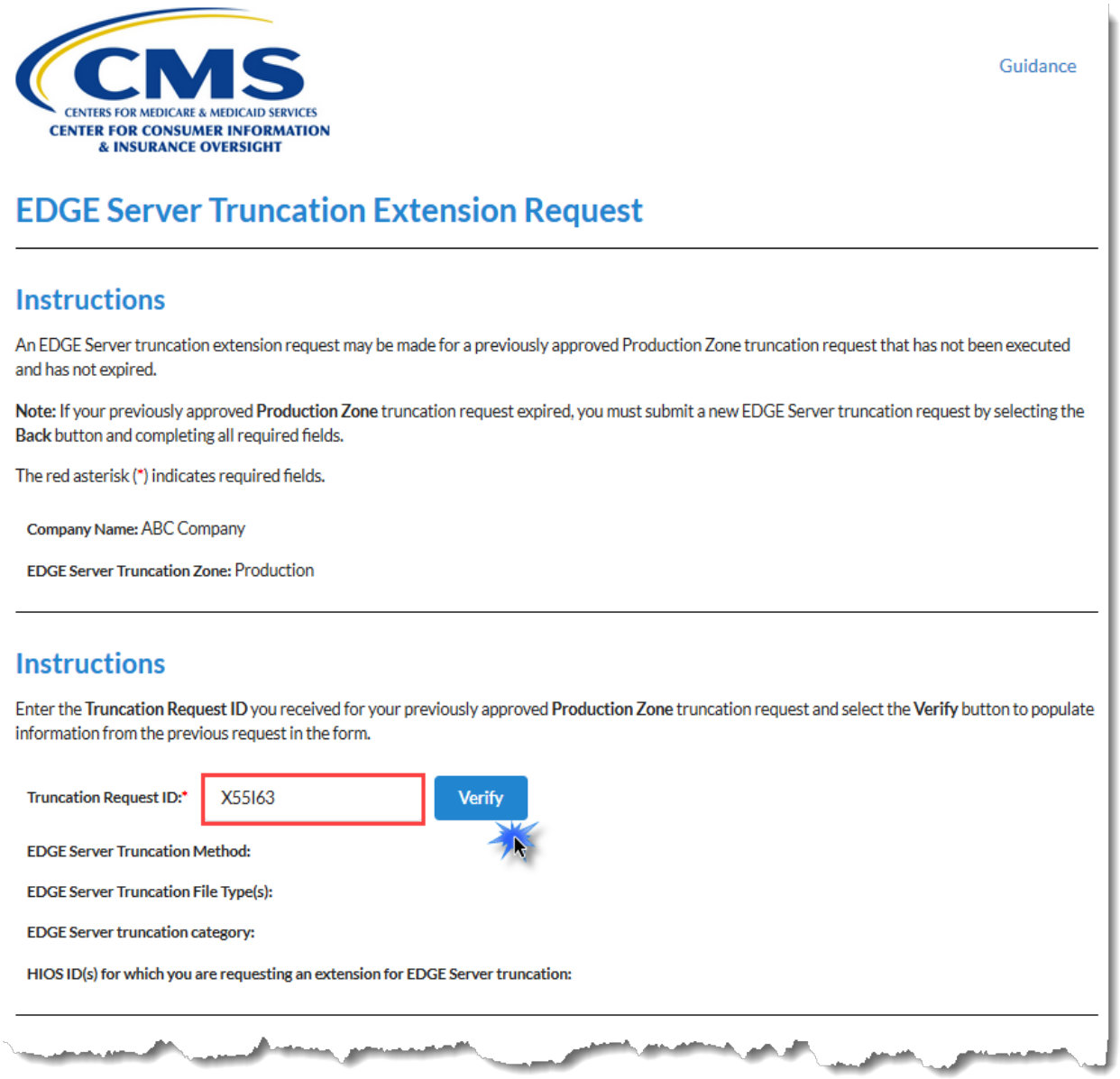
Note: If your previously approved Production Zone truncation request expired, you must submit a new EDGE Server truncation request by selecting the Back button and completing all required fields.

The *EDGE Server Truncation Extension Request* page requires you to enter the previous Truncation Request ID in order to request an extension. The Truncation Request IDs for previously submitted truncation requests are available in the Truncation Request History table on the *Truncation* tab.

Follow these steps to complete the *EDGE Server Truncation Extension Request* page:

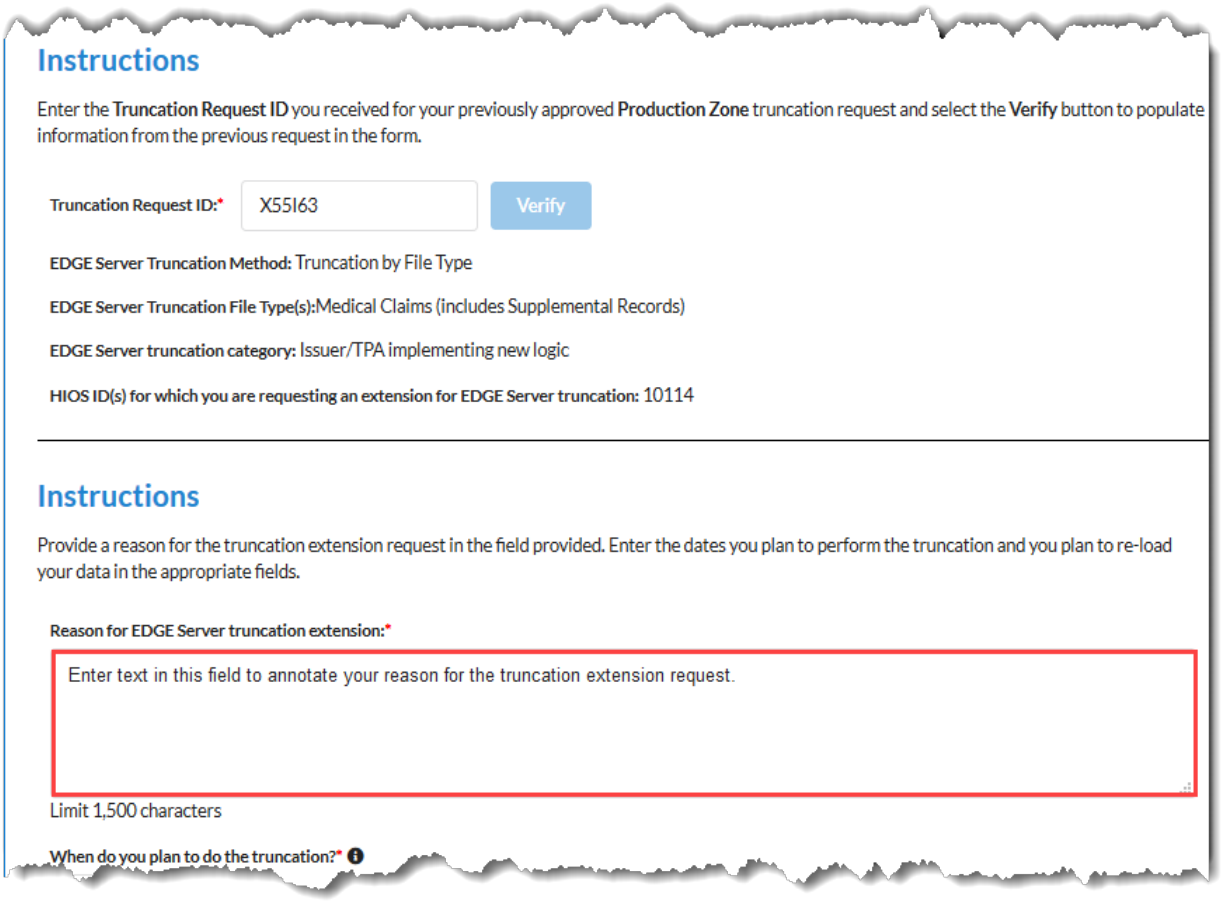
1. Enter the Truncation Request ID from your previously submitted request in the **Truncation Request ID** field.
2. Select the **Verify** button to continue.

Figure 30: Extension Page



3. Enter the reason for your truncation extension request, including the type of data affected (enrollment, medical claims, pharmacy claims, or supplemental records) and an approximate count or percentage of your total records that need to be corrected, in the **Reason for EDGE Server truncation extension** field. This field has a limit of 1,500 characters.

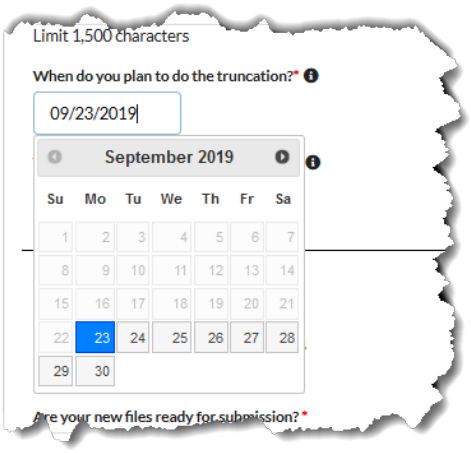
Figure 31: Truncation Extension Request Reason



4. Enter the planned truncation date in the **When do you plan to do the truncation?** field.

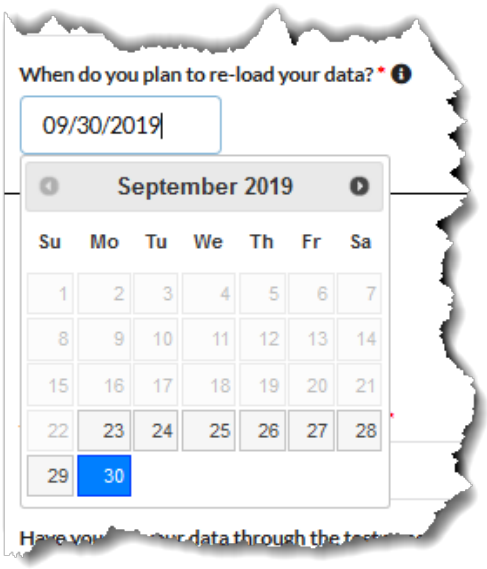
> **Note: This date must be at least one business day from today's date.**

Figure 32: Planned Truncation Date



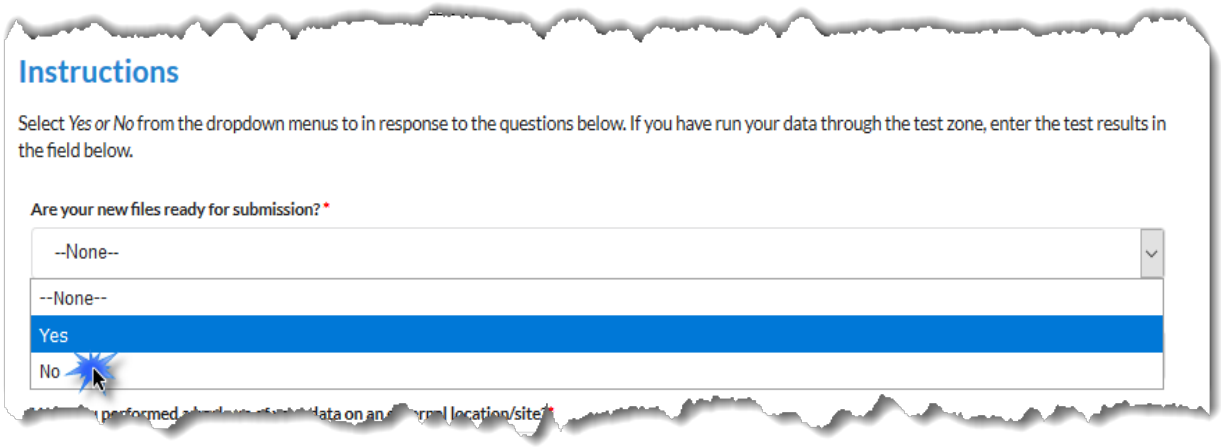
5. Enter your planned re-load date in the **When do you plan to re-load your data?** field. This date must be greater than or equal to the planned truncation date.

Figure 33: Planned Re-load Date Selection



6. Select Yes or No from the **Are your new files ready for submission?** dropdown list.

Figure 34: Files Ready for Submission Selection



7. Select Yes or No from the ***Have you run your data through the test zone?*** dropdown list. If you select Yes, enter the test results in the required field.

Figure 35: Data Test Selection



Figure 36: Test Results



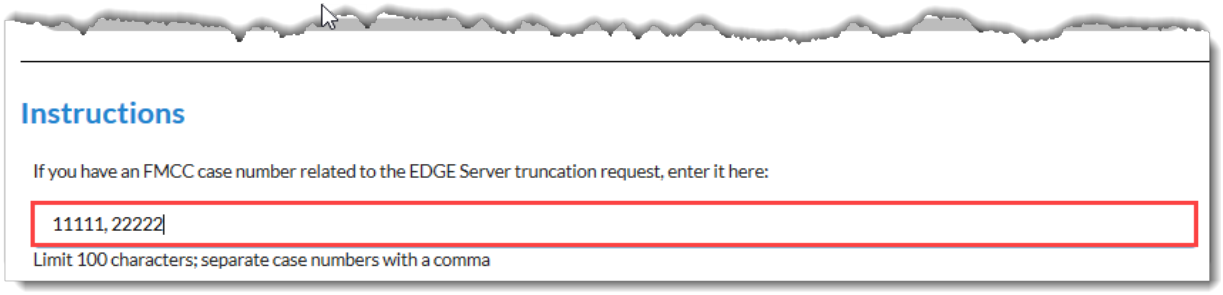
8. Select Yes or No from the ***Have you performed a back-up of your data on an external location/site?*** dropdown list.

Figure 37: Data Back-up Selection



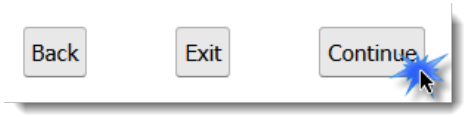
9. Enter any FMCC case numbers, if available, in the ***If you have an FMCC case number related to the EDGE Server truncation request,*** enter it here field. Case numbers must be separated by a comma and the field limit is 100 characters.

Figure 38: FMCC Number Input



10. Select the **Continue** button. You will be directed to the **Summary** page of the form.

Figure 39: Continue Button



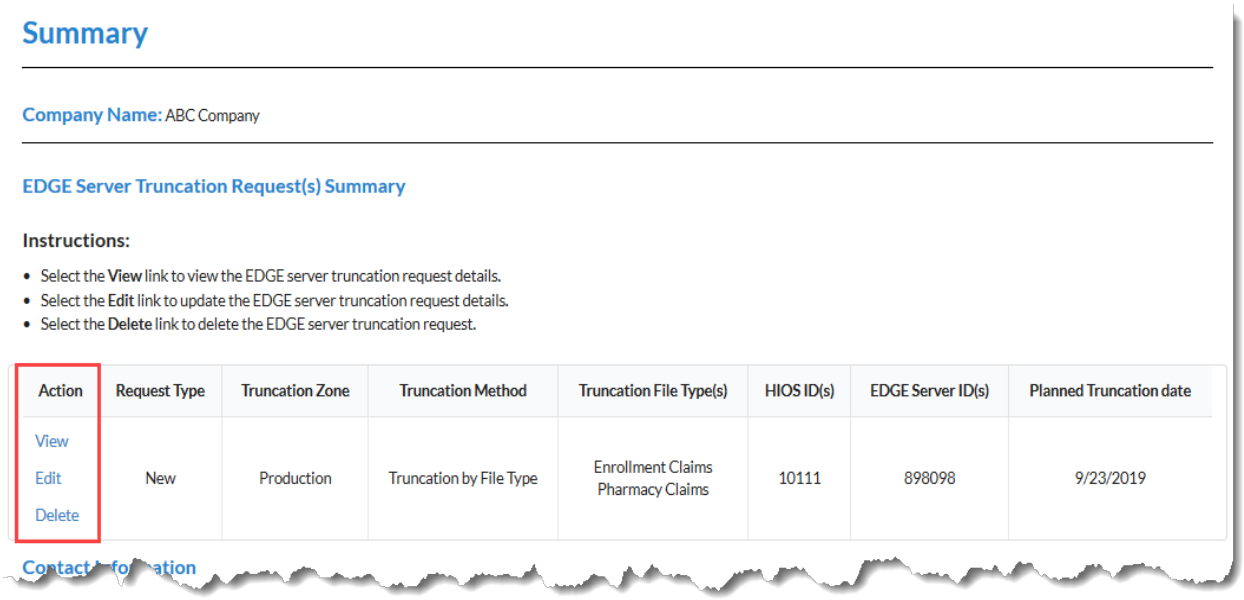
Note: You are able to submit an additional truncation request or truncation extension request from the *Summary* page, if needed.

8 Summary Page

The *Summary* page allows you to view and edit EDGE server truncation request details and contact information. Follow these steps to complete the *Summary* page:

1. Review the ***EDGE Server Truncation Request(s) Summary*** table, which contains the details of each truncation request or truncation extension request entered during this session. In the Action column, select the appropriate link as needed.
    - Select the **View** link to view the EDGE server truncation request details
    - Select the **Edit** link to update the EDGE server truncation request details
    - Select the **Delete** link to delete the EDGE server truncation request

Figure 40: EDGE Server Truncation Request(s) Summary



Summary

Company Name: ABC Company

EDGE Server Truncation Request(s) Summary

Instructions:

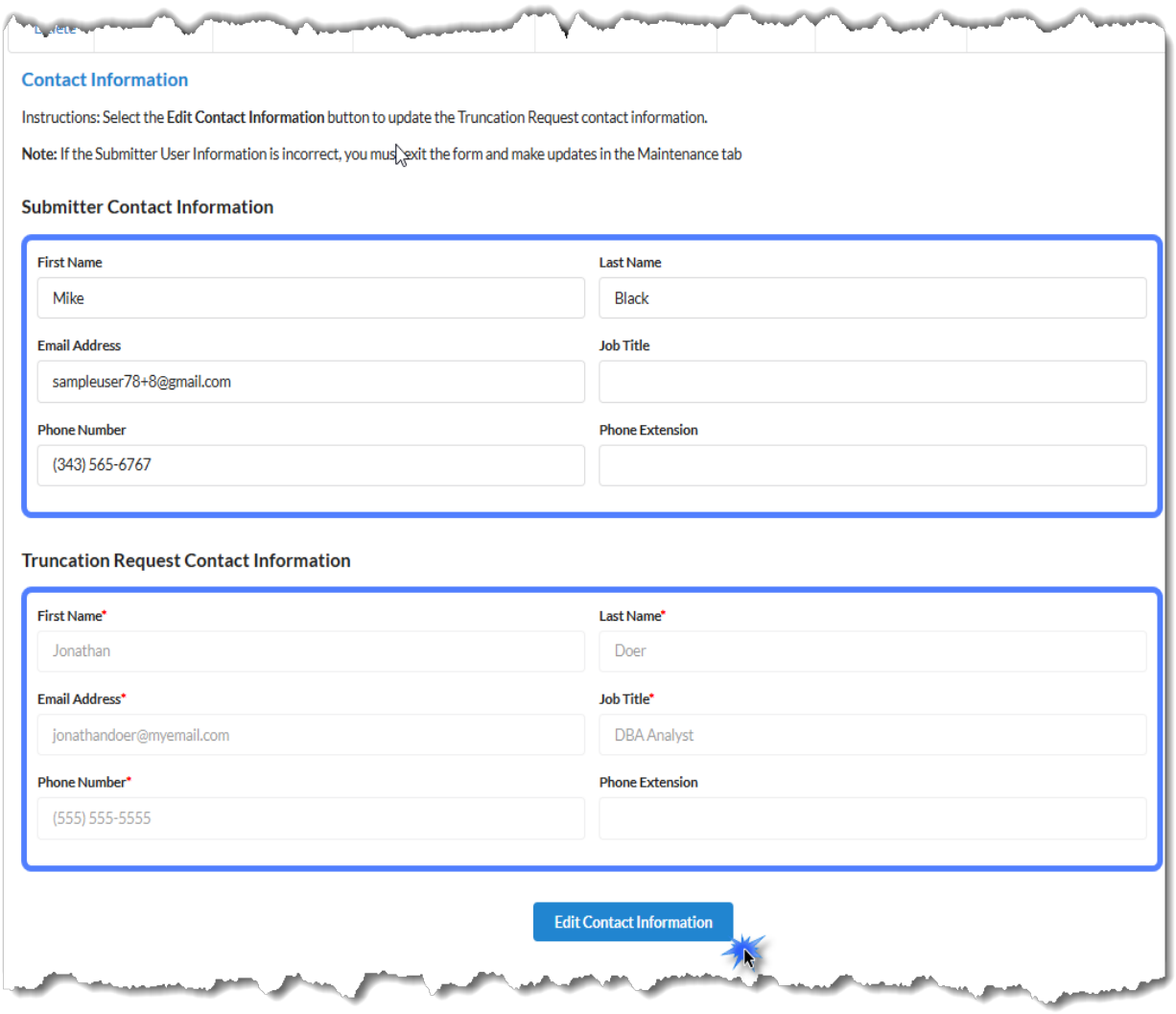
- Select the **View** link to view the EDGE server truncation request details.
- Select the **Edit** link to update the EDGE server truncation request details.
- Select the **Delete** link to delete the EDGE server truncation request.

Action	Request Type	Truncation Zone	Truncation Method	Truncation File Type(s)	HIOS ID(s)	EDGE Server ID(s)	Planned Truncation date
View Edit Delete	New	Production	Truncation by File Type	Enrollment Claims Pharmacy Claims	10111	898098	9/23/2019

Contact Information

2. Review the Contact information summary. If needed, select the **Edit Contact Information** button to update the information.

Figure 41: Contact Information Summary



Note: If the Submitter Contact Information is incorrect, you must exit the form and make updates in the Maintenance tab.

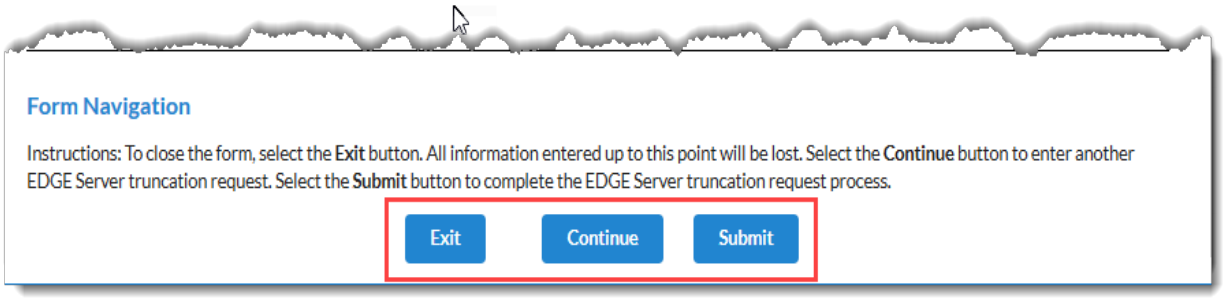
3. Select the appropriate button to navigate to the appropriate page. Refer to Table 2.

Table 2: Summary Page Navigation

If	Then
You need to enter another truncation request,	Select the **Continue** button to enter another EDGE server truncation request. The form will navigate to the *EDGE Server Truncation Request Type* page (refer to Section 5).

If	Then
You have finished entering your truncation extension request(s),	Select the **Submit** button to complete the EDGE server truncation extension request process. The form will navigate to the *Confirmation* page (continue to Section 9).

Figure 42: Form Navigation Buttons



9 Confirmation Page

After selecting the **Submit** button on the *Summary* page, an acknowledgement email will be sent to the email addresses provided. Select the **Exit** button to exit the form.

Figure 43: Confirmation Page

