

CMS Issuer Technical Work Group

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- ***Housekeeping***
 - ***Reminder: New Enrollment***
 - ***Webinar Schedule***
 - ***Registration Reminders:
New Tuesday and Thursday
Issuer Workgroup Calls***
 - ***Reminders: CMS Issuer
Communications***
 - ***Pre-Audit and Recon Update***
 - ***ERR***
 - ***Enhanced Direct Enrollment (EDE) Updates:
Compliance Team***
 - ***Direct Enrollment (DE) Updates:
Enrollment Team***
 - ***Q&A***
- February 25, 2020***

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New 2020 Series for the CMS Issuer Technical Workgroup Call (Series I) and the Thursday Recon IC834 Workgroup

- The Tuesday Issuer Technical Workgroup started a new series on today Tuesday, January 7, 2020 at 3:00 PM EST.
- The Thursday Recon-IC834 Workgroup call started a new series on this Thursday, January 9, 2020

Please see the registration URLs for both calls below:

- Tuesday Issuer Technical Workgroup Call
letsmeet.webex.com/letsmeet/k2/j.php?MTID=t01b9595808d2c0225f5bbe4308047786
- Thursday Recon IC834 Workgroup Call
<https://letsmeet.webex.com/letsmeet/k2/j.php?MTID=tf57cab5409c2b02cd5ea749302c3014a>
 - You will register one time, for the entire Tuesday Issuer Technical Workgroup Call Series I (through, July 28, 2020) and the Thursday Recon-IC834 Workgroup Series (through July 30, 2020)
Once the host approves your registration, you will receive a confirmation email with instructions for joining the session.
 - Subsequently, registration information for both the Tuesday Issuer Technical Workgroup call will be sent in our daily CMS Issuer Communication blast messages.

Note: CMS will continue to keep call participants informed of any further changes of the Cisco Web-EX platform.

February 2020

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
02	03	04	05	06	07	08
09	10 CCIIO Enrollment Webinar(Policy Focus) 12:00pm-1:00pm	11 CMS Issuer Technical Workgroup 3:00pm-4:30	12	13 Data Recon & Inbound 834/BAA Workgroup 12:30-1:30pm	14	15
16	17 CCIIO Enrollment Webinar(Policy Focus) 12:00pm-1:00pm	18 CMS Issuer Technical Workgroup 3:00pm-4:30	19	20 Data Recon & Inbound 834/BAA Workgroup 12:30-1:30pm	21	22
23	24 No CCIIO Enrollment Policy call due to the MLK Federal Holiday	25 CMS Issuer Technical Workgroup 3:00pm-4:30	26	27 Data Recon & Inbound 834/BAA Workgroup 12:30-1:30pm	28	
01 March	02 CCIIO Enrollment Webinar(Policy Focus) 12:00pm-1:00pm	03 CMS Issuer Technical Workgroup 3:00pm-4:30	04	05 Data Recon & Inbound 834/BAA Workgroup 12:30-1:30pm	06	07

CMS ISSUER COMMUNICATIONS

CMS uses a mass communications tool to distribute notices and general communications to issuers regarding topics such as *Enrollment Pre-Audit files; Enrollment Reconciliation Files; Open Enrollment Activities; IC834 Activities (Specifically Processing schedules, delays in processing or reporting), other alerts AND*

Daily UAT status

If you are not receiving these email communications:

1. To immediately see what message was blasted out, **you can access the daily CMS Issuer Communications on CMSzONE at:** <https://zone.cms.gov/community/issuer-community-private>
2. Contact the CMS_Issuer_Communications@cms.hhs.gov and confirm if you are listed as a point of contact (POC) for these communications for your organization.
 - » If you are not listed as a POC please see page 2 of this deck for instructions on being added. If you are a POC please proceed to the next step.
3. CMS recommends the applicable IP addresses (found at the urls below) are whitelisted. CMS recommends users work with their organization's IT support staff to whitelist both Salesforce's IP address as well as the relevant government ranges. More details are provided at the following resources*:

https://help.salesforce.com/articleView?id=000199327&language=en_US&type=1

https://help.salesforce.com/apex/HTViewSolution?urlname=What-are-the-Salesforce-IP-Addresses-to-whitelist&language=en_US

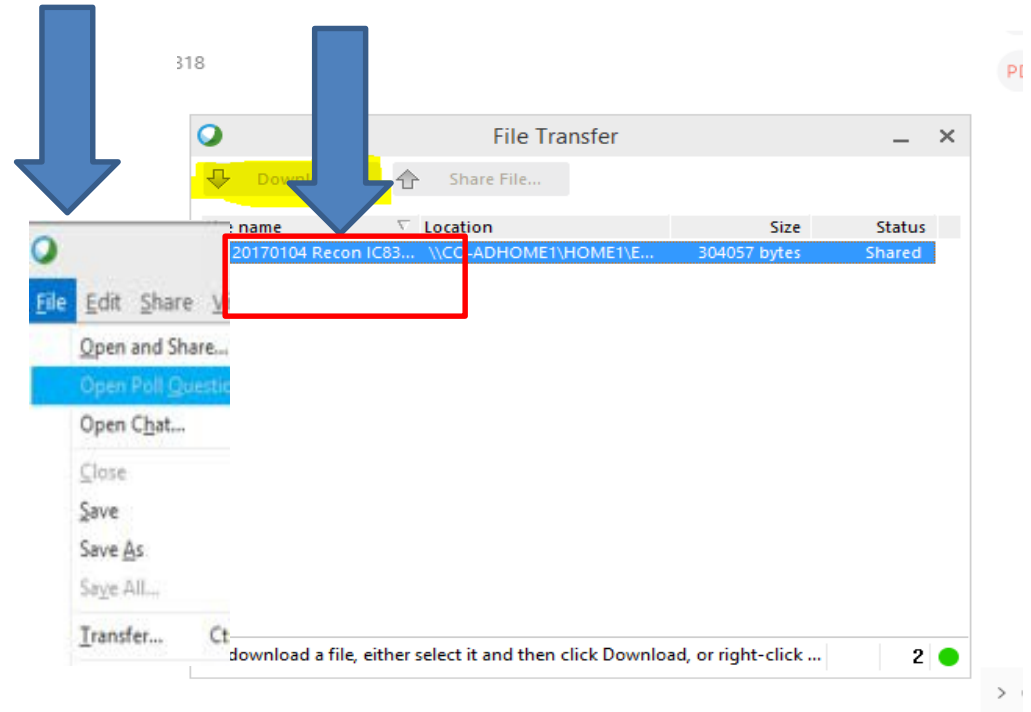
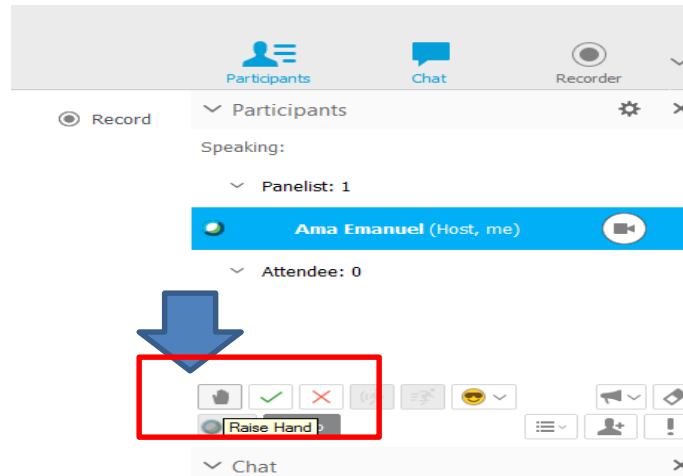
* There are some Issuers/DE Partners that may still experiencing problems after whitelisting. This is a known issue and we will report out once the issue is resolved.

If you have any further questions please contact the CMS FEPS Help Desk at: CMS_Issuer_communication@cms.hhs.gov

Asking a Question/Downloading the Meeting pdf slides in the Web-Ex Platform

To ask a question, please select the raised hand icon at the start of Q&A session. It is the icon at the bottom of the participant list. Please deselect by clicking on the hand again. This would apply whether you no longer have a verbal question or once our question is answered.

To download the pdf version of today's deck, open the "File Transfer" box on your screen. If not, please select "File, then "Transfer" and "Download" (as captured below.) The "Download" button will be grey.



Access to CMSzONE & the Private Issuer Community

User Access Quick Guide

A copy of the comprehensive User Access Quick Guide is posted on zONE @:

<https://zone.cms.gov/document/zone-access-troubleshooting> (pre-log in required to access zONE links)

Three audiences:

1. **New Users** (new to zONE & EIDM)
2. **Existing EIDM Users** (new user to zONE)
3. **Existing zONE Users** (unable to log-in since the EIDM transition)

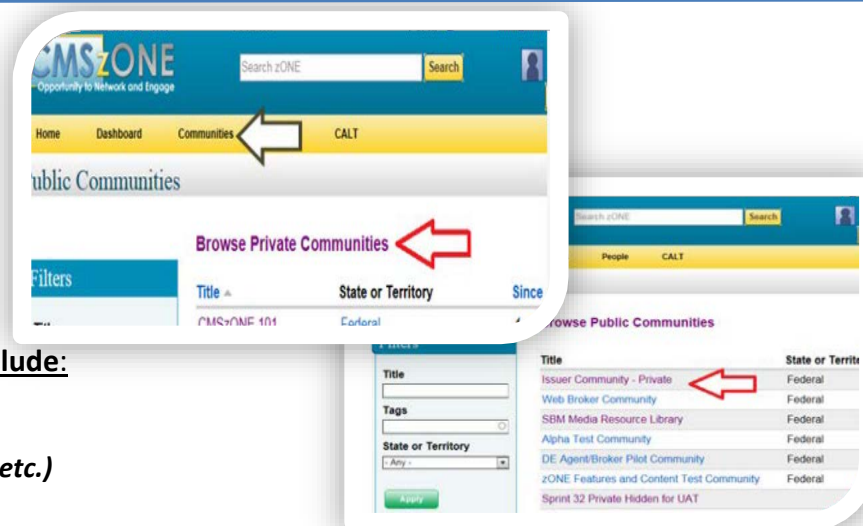
EIDM Registration Process: *(Pre-requisite to CMSzONE Access)*

1. Register for access at EIDM Enterprise Portal Here: <https://portal.cms.gov/>
2. Log in with your EIDM credentials and click on “Request Access Now”
3. Click on “Request New Access” and choose CMSzONE

CMSzONE Private Issuer Community

Access: *(After being granted EIDM access)*

1. Log into zONE; click on the **Communities** tab
2. Click **Browse Private Communities**
3. Click **Issuer Community – Private**
4. Click **Join Community**
5. Provide explanation of why you need access to this community; **Include:**
 - name and contact information
 - issuer POC contacts
 - specific work for issuer (i.e. fill out QHP templates, processing 834's, etc.)



Troubleshooting access to CMSzONE

REGISTRATION, PASSWORD RESETS, & FORGOTTEN PASSWORDS

- **New Users:** Registration & community approval are typically completed in 1-3 business days, if not sooner.

If you are unable to access zONE, and/or the issuer community after 3 business days you may email a follow up request to the helpdesk & the issuer communications team (addresses below) for an update. Please include any provided ticket numbers & applicable context for reference.

- **Existing zONE Users :** Password resets are also typically completed in 1-3 business days, if not sooner.

If your request is not completed after 3 business days, you may email a follow up request to the helpdesk & the issuer communications team (addresses below) for an update. Please include any provided ticket numbers & applicable context for reference.

ALL OTHER CMSzONE ACCESS ISSUES

Prerequisite Details

- **Capture screenshots of any errors received so our teams can troubleshoot**

☐ PC = Ctrl + PrtScn to capture, Ctrl + V to paste / Mac = Command+Shift+4 to capture & send to a desktop file

Email

- **Provide screenshots and applicable prerequisite information above, in an email body, as follows:**

- ❖ With the subject line: **“zONE Access Issues”**
- ❖ To: CMS_FEPS@cms.hhs.gov
- ❖ Cc: or Bcc: CMS_Issuer_Communications@cms.hhs.gov

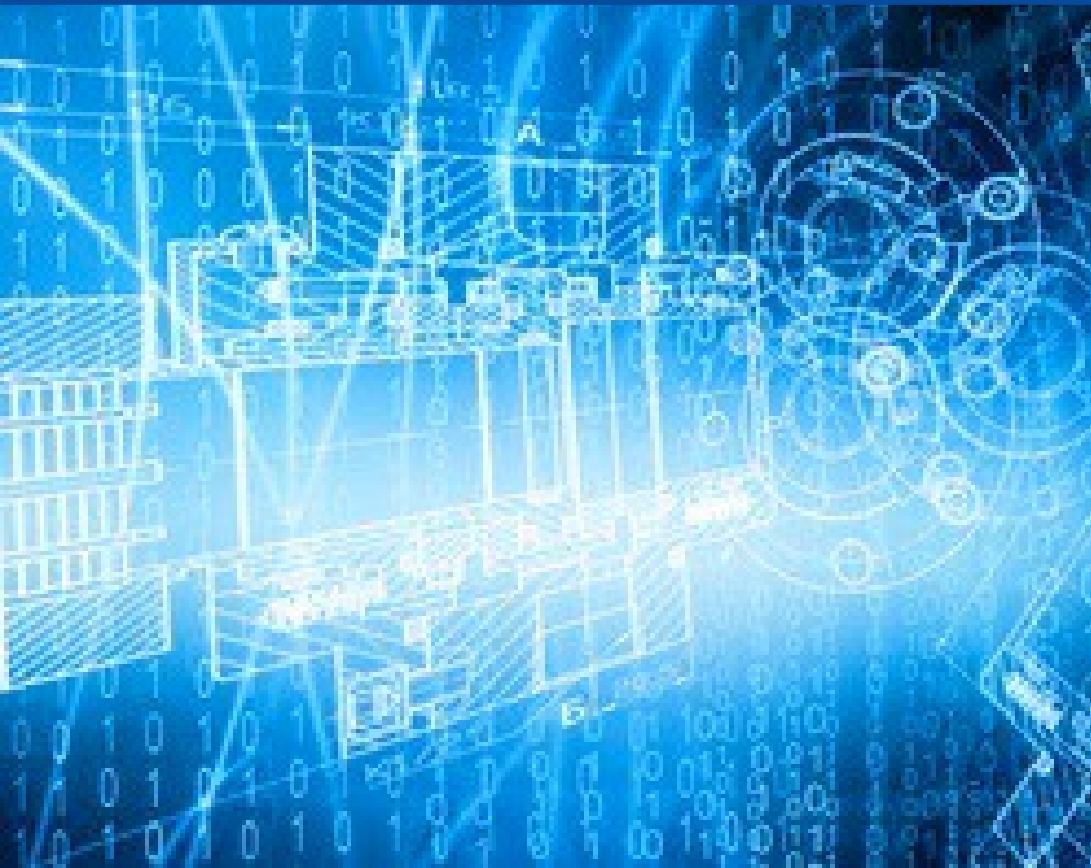
Reminder: Supported Browser Versions

- ✓ Internet Explorer Version 9.0
- ✓ Internet Explore Version 10.0
- ✓ Google Chrome
- ✓ Safari

Follow-Up

- **If the issue is not resolved within 3 business days, you may email a follow up request:**
 - ❖ With the subject line: **“zONE Access Issues : 3+day follow up”**
 - ❖ To: CMS_FEPS@cms.hhs.gov & CMS_Issuer_Communications@cms.hhs.gov
 - ❖ Include (where possible) explanation message, screenshots, ticket #(s) received, and number of days outstanding

Housekeeping: Enrollment Pre-Audit & Reconciliation



Enrollment Pre-Audit & Reconciliation

Tuesday, February 24, 2020

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Housekeeping: Pre-Audit & Reconciliation

- **Prior Plan Years (2014-2019)**
 - A 1095-A Consumer-Initiated Dispute Update (1095Ax) Files were delivered to Issuers on Thursday, February 20th
 - The next set of 1095Ax Files is scheduled for delivery on Wednesday, March 4th
- **Plan Year 2015**
 - A full 2015 FFM extract was taken on Thursday, February 13th at 6PM EST
 - Comprehensive 2015 Pre-Audit (AUD15) Files based upon that extract were distributed to Issuers last Tuesday, February 18th
- **Plan Year 2017**
 - This month's 2017 FFM extract was taken on Saturday, February 15th at 6PM EST
 - Incremental 2017 Pre-Audit (ISIPA7) Files based upon that extract were delivered to Issuers on Thursday, February 20th
- **Plan Year 2018**
 - This month's 2018 FFM extract was taken on Saturday, February 15th at 6PM EST
 - Incremental 2018 Pre-Audit (ISIPA8) Files based upon that extract were delivered to Issuers on Thursday, February 20th

Housekeeping: Pre-Audit & Reconciliation

- **Plan Year 2019**

- This month's 2019 FFM extract was taken on Saturday, February 15th at 6PM EST
- Comprehensive 2019 Pre-Audit (AUD9) Files based upon that extract were distributed to Issuers on Wednesday, February 19th
- The RCNI9 submission deadline for February's Run 15 was **last Thursday, February 20th at 3PM EST**
 - RCNO9 Files for Run 15 are being distributed to Issuers today, Tuesday, February 25th
- **Reminder:** Next month's cycle is the final scheduled reconciliation cycle for PY2019! RCNI9 files are due at 3PM EST on Thursday, March 19th

Housekeeping: Pre-Audit & Reconciliation

- **Plan Year 2020**

- This month's 2020 FFM extract was taken on Saturday, February 15th at 6PM EST
- Comprehensive 2020 Pre-Audit (AUD0) Files based upon that extract were distributed to Issuers on Wednesday, February 19th
- The RCNIO submission deadline for February's Run 3 is **this Thursday, February 27th at 3PM EST**
 - As of 2PM today, approximately **77%** of 2020 Issuers have successfully submitted for Run 3
 - RCNO0 Files for Run 3 will be distributed to participating Issuers on Tuesday, March 3rd

Updated Pre-Audit and Reconciliation Calendar

- CMS has published an updated 2020 Pre-Audit and Reconciliation Calendar to zONE at:
<https://zone.cms.gov/document/pre-audit-and-recon-calendar-and-file-specification>
- The updates in this version include:
 - Full calendar of file submission deadlines and file deliveries through July 2020 in the Pre-Audit and Reconciliation Calendar
 - Addition of ISIPA4 and ISIPA5 function codes for 2014 and 2015 Incremental Pre-Audit Files

February 2020

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
26	27 ER&R Dispute Submissions Due	28 Delivery to Issuers: • 2019 RCNO File	29	30 2020 RCNI Due 3pm	31	Feb 1
2	3	4 Delivery to Issuers: • 2020 RCNO File	5 Delivery to Issuers: • 1095A Dispute Correction IPA Files	6	7	8
9	10	11	12 Delivery to Issuers: • 2020 Carry forward Cancel 834s	13 2015 Pre-Audit Extract (6:00 pm ET)	14	FFM Updated 2020 & 2019 2020, 2019 Pre-Audit Extract (6:00 pm ET) 2018 & 2017 Incremental Pre-Audit Extract (6:00 pm ET)
16	17 Presidents' Day	18 Delivery to Issuers: • 2015 Pre-Audit File	19 Delivery to Issuers: • 2020 Pre-Audit File Delivery to Issuers: • 2019 Pre-Audit File	20 2019 RCNI Due 3pm	21	22
23	24 Data Matching Outreach File ER&R Dispute Submissions Due	25 Delivery to Issuers: • 2019 RCNO File	26	27 2020 RCNI Due 3pm	28 HIX 820 Delivery (01/15/20 FFM Extract)	29



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March 2020

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
March 1	2	3 Delivery to Issuers: • 2020 RCNO File	4 Delivery to Issuers: • 1095A Dispute Correction IPA Files	5	6	7
8	9	10	11	12	2014 Pre-Audit Extract (6:00 pm ET)	14
				Delivery to Issuers: • 2020 Carry forward Cancel 834s		
			PPR Delivery 02/15/20 FFM Extract			
FFM Updated 2020 & 2019 2020, 2019 Pre-Audit Extract (6:00 pm ET) 2018 & 2017 Incremental Pre-Audit Extract (6:00 pm ET)	16	Delivery to Issuers: • 2020 Pre-Audit File Delivery to Issuers: • 2019 Pre-Audit File Delivery to Issuers: • 2014 Pre-Audit File	Delivery to Issuers: • 1095A Dispute Correction IPA Files Delivery to Issuers: • 2018 Incremental Pre- Audit File Delivery to Issuers: • 2017 Incremental Pre- Audit File	19 2019 RCNI Due 3pm	20 Treasury Payment	21
22	23 ER&R Dispute Submissions Due	24 Delivery to Issuers: • 2019 RCNO File	25 Data Matching Outreach File	26 2020 RCNI Due 3pm	27	28
29	30	31 Delivery to Issuers: • 2020 RCNO File HIX 820 Delivery (02/15/20 FFM Extract)	April 1 st Delivery to Issuers: • 1095A Dispute Correction IPA Files	2	3	4



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April 2020

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
29	30	31 Delivery to Issuers: • 2020 RCNO File	April 1st Delivery to Issuers: • 1095A Dispute Correction IPA Files	2	3	4
5	6	7	8	9	10	11
12	13 2016 Incremental Pre-Audit Extract (6:00 pm ET)	14	FFM Updated 2020 & 2019 2020, 2019, 2018 Pre-Audit Extract (6:00 pm ET) 2017 Incremental Pre-Audit Extract (6:00 pm ET) Delivery to Issuers: • 2016 Incremental Pre-Audit File Delivery to Issuers: • 1095A Dispute Correction IPA Files	16	17 Delivery to Issuers: • 2020 Pre-Audit File Delivery to Issuers: • 2019 Pre-Audit File	18
19	20 Delivery to Issuers: • 2018 Pre-Audit File Delivery to Issuers: • 2017 Incremental Pre-Audit File	21	22 Treasury Payment	23 Data Matching Outreach File 2020 RCNI Due 3pm	24	25
26	27 ER&R Dispute Submissions Due	28 Delivery to Issuers: • 2020 RCNO File	29	30 HIX 820 Delivery (03/15/20 FFM Extract)	May 1	2



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May 2020

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
26	27 ER&R Dispute Submissions Due	28 Delivery to Issuers: • 2020 RCNO File	29	30	May 1	2
3	4	5	6 Delivery to Issuers: • 1095A Dispute Correction IPA Files	7	8	9
10	11	12	13 2015 Incremental Pre-Audit Extract (6:00 pm ET)	14	FFM Updated 2020 2020, 2019 Pre-Audit Extract (6:00 pm ET) 2018 & 2017 Incremental Pre-Audit Extract (6:00 pm ET) Delivery to Issuers: • 2015 Incremental Pre-Audit File	16
			PPR Delivery 04/15/20 FFM Extract			
17	18	19 Delivery to Issuers: • 2020 Pre-Audit File Delivery to Issuers: • 2019 Pre-Audit File	20 Delivery to Issuers: • 1095A Dispute Correction IPA Files Delivery to Issuers: • 2018 Incremental Pre-Audit File Delivery to Issuers: • 2017 Incremental Pre-Audit File	21 2020 RCNI Due 3pm Treasury Payment	22	23
24	25 Memorial Day	26 Data Matching Outreach File ER&R Dispute Submissions Due	27 Delivery to Issuers: • 2020 RCNO File	28	29 HIX 820 Delivery (04/15/20 FFM Extract)	30



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June 2020

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
31st	June 1st	2	3 Delivery to Issuers: • 1095A Dispute Correction IPA Files	4	5	6
7	8	9	10	11	12 2014 Incremental Pre-Audit Extract (6:00 pm ET)	13
				PPR Delivery 05/15/20 FFMExtract		
14	FFM Updated 2020 2020, 2019 , 2017 Pre-Audit Extract (6:00 pm ET) 2018 Incremental Pre-Audit Extract (6:00 pm ET) PPR Delivery 05/15/20 FFMExtract	16 Delivery to Issuers: • 2014 Incremental Pre-Audit File	17 Delivery to Issuers: • 2020 Pre-Audit File Delivery to Issuers: • 2019 Pre-Audit File Delivery to Issuers: • 1095A Dispute Correction IPA Files	18 2020 RCNI Due 3pm Delivery to Issuers: • 2018 Incremental Pre-Audit File Delivery to Issuers: • 2017 Pre-Audit File	19	20
21	22 ER&R Dispute Submissions Due Treasury Payment	23 Delivery to Issuers: • 2020 RCNO File	24 Data Matching Outreach File	25	26	27
28	29	30 HIX 820 Delivery (05/15/20 FFM Extract)	July 1st Delivery to Issuers: • 1095A Dispute Correction IPA Files	2	3	4



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July 2020

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
28	29	30	July 1 st Delivery to Issuers: • 1095A Dispute Correction IPA Files	2	3 Independence Day	4
5	6	7	8	9	10	11
12	13 2016 Incremental Pre-Audit Extract (6:00 pm ET)	14	FFM Updated 2020 2020 Pre-Audit Extract (6:00 pm ET) 2019,2018, 2017 Incremental Pre-Audit Extract (6:00 pm ET) Delivery to Issuers: • 2016 Incremental Pre-Audit File Delivery to Issuers: • 1095A Dispute Correction IPA Files	16	17 Delivery to Issuers: • 2020 Pre-Audit File Delivery to Issuers: • 2019 Incremental Pre-Audit File	18
	PPR Delivery 06/15/20 FFMEx					
19	20 Delivery to Issuers: • 2018 Incremental Pre-Audit File Delivery to Issuers: • 2017 Incremental Pre-Audit File	21	22 Treasury Payment	23 Data Matching Outreach File 2020 RCNI Due 3pm	24	25
26	27 ER&R Dispute Submissions Due	28 Delivery to Issuers: • 2020 RCNO File	29 Delivery to Issuers: • 1095A Dispute Correction IPA Files	30	31 HIX 820 Delivery (06/15/20 FFM Extract)	August 1st



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ER&R Topics

- ✓ **Topics**
 - ✓ UIR Report Delivery
 - ✓ Reminder: 2019 UIE Manual Payment Timeline
- ✓ **Q&A**

February 25, 2020

UIR Report Delivery

- ER&R delivered the first UIR Reports for 2020 policies on Friday, February 21, for RCNO Run 2 using the new **UIR0** function code.
- ER&R delivered the RCNO Run 14 UIR Reports for 2019 policies on Friday, February 14, using the **UIR9** function code.

NOTE: Only issuers with UIRs in that RCNO run received UIR Reports.

Reminder: 2019 UIE Manual Payment Timeline

- The manual payment activities are as follows:
 - **April 2020:** Analyze Run 16 (March 2020) RCNO data to identify Prior_Year UIEs that are eligible for payment
 - **May 2020:** Deliver Manual Payment Summary and Detail Reports to issuers
 - **June 2020:** Issuers receive adjustments in the June payment cycle
- Issuers should ensure financial alignment of Enrollment Blockers by submitting HICS cases through the HICS Direct Dispute process, as manual payments will not be made.
- Per the 04/17/2019 guidance from CMS, manual payment adjustments will not be made on any issuer-reported coverage after 07/31/2019.
 - Access this guidance on CMS zONE at [https://zone.cms.gov/system/files/documents/2019_uie_issuer_letter .pdf](https://zone.cms.gov/system/files/documents/2019_uie_issuer_letter.pdf).
 - For additional guidance or for issuers who are new to the UIR process, please refer to the UIR Master Guidance and UIR TRG on CMS zONE at <https://zone.cms.gov/document/enrollment-resolution-and-reconciliation>.

Enhanced Direct Enrollment (EDE) Updates: Compliance Team



Tuesday, February 25, 2020

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EDE Business Requirements Audit Toolkit Update

- CMS released updated baseline Eligibility Results Toolkits (Phase 1 and 2) on 2/21/20 (e.g., test data in Test Case 2.A was updated)
- Prospective EDE Entities (including Entities considering phase changes) that intend to submit EDE audits this year and their Auditors must use the updated versions found in the Business Requirements Audit Baseline toolkit zip folder (named “2020 Business Report Template and Toolkits”) available at the following link on CMS zONE:
<https://zone.cms.gov/document/business-audit>
- Entities and Auditors that did not use the prior version of the toolkits can disregard this update, and simply start this portion of the audit using the versions available on CMS zONE
- For Auditors that used the prior versions, when transferring findings to the updated toolkits, they must first review the updated toolkits to assess if they need to re-review requirements before transferring their findings

Direct Enrollment (DE) Updates: Enrollment Team



Tuesday, February 25, 2020

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Reminder and Update for EDE Partners: FARS API Schema Missing RF3 FinalDecisionCode Enumeration Value

- EDE Partners, as a reminder, we've identified an inaccuracy in the FARS API schema
 - Specifically, we've identified that the FinalDecisionCode field in the FARS API response schema should also include an acceptable enumeration value of "RF3"
 - Similar to the RIDP schema, RF3 represents a use limit violation in the FARS schema, where a user has attempted to remotely identity proof themselves too many times within a 48 hour period, without success
- The Hub is expected to update their FARS schema so that RF3 is reflected as an acceptable enumeration value for the FinalDecisionCode in the FARS API response
 - The Hub deployed the schema update to UAT0 on 2/14 and will be deploying the schema update to production on 3/1
 - An updated Hub BSD has been uploaded to zONE, and is available at <https://zone.cms.gov//document/enhanced-direct-enrollment-edo-documents-and-materials>
 - The Hub will make the updated schema available via new endpoints:
 - » UAT0:
 - RIDP: <https://impl.hub.cms.gov/RIDPServiceDEV3>
 - FARS: <https://impl.hub.cms.gov/FARSServiceDEV3>
 - » Production:
 - RIDP: <https://hub.cms.gov/RIDPServiceDEV3>
 - FARS: <https://hub.cms.gov/FARSServiceDEV3>
 - » **Update:** The prior versions of the endpoints and schemas for the RIDP and FARS APIs will be available for use until 5/29/2020
 - The prior versions of the endpoints will be decommissioned on 5/29 between 9:00 and 10:00 AM ET
 - EDE Partners using the RIDP and FARS APIs will therefore need to update their schemas and move to the new endpoints prior to this time
 - As a reminder, in the short-term EDE Partners should be aware that they may receive an RF3 FinalDecisionCode value in the FARS API response
 - Thus, EDE Partners using the FARS API will likely want to make the necessary changes to accept the RF3 value when it is received in the FARS API response

Reminder and Update for EDE Partners: New Update Policy API – Cancel/Termination Functionality

- EDE Partners, as a reminder, CMS is deploying a new Update Policy API
 - The API has already been deployed to UAT0 and is available for testing
 - EDE Partners are encouraged to test the API as soon as possible, and to report any potential defects to both CMS_FEPS@cms.hhs.gov and CMS.FFM.EDESsupport@accenturefederal.com
 - The API is expected to be available for production use beginning on 3/20/2020
 - EDE Partners are required to integrate with the API and provide their users with UI cancellation/termination functionality by 6/15/2020
 - » CMS has created CR #30, which is now reflected on the EDE CMS Initiated CR Tracker available on zONE at <https://zone.cms.gov//document/enhanced-direct-enrollment-edc-documents-and-materials>
 - The long-term CMS vision is that the Update Policy API will eventually replace the Submit Enrollment API
 - In the short-term however, the initial rollout of the API will provide EDE Partners and their users with cancel/termination functionality
 - » EDE users are currently required to go to HealthCare.gov or the FFM Call Center to cancel/terminate a policy
 - This API should therefore allow EDE Partners to have even more control over the end-to-end application and enrollment experience, and improve the overall EDE user experience
 - The Update Policy API Specs are available on zONE at <https://zone.cms.gov//document/enhanced-direct-enrollment-edc-documents-and-materials>
 - The new Hub endpoints for the Update Policy API are below:
 - UAT0: <https://impl.hub.cms.gov/ede-ies/v1/policies>
 - Production: <https://hub.cms.gov/ede-ies/v1/policies>

Reminder and Update for EDE Partners: New Update Policy API – Cancel/Termination Functionality

- **General Business Rules:**
 - EDE Partners will need to use the Get Enrollment API to determine which policies exist and subsequently which can be cancelled/terminated
 - The initial rollout of the cancel/termination functionality in this API will mirror what is allowed in My Account on HealthCare.gov (additional enhancements to cancel/termination functionality are on the long-term CMS roadmap):
 - If cancelling/terminating health coverage, the API request will only allow for cancellation/termination of all active health policies at one time
 - » In other words, if multiple active health policies exist, a user will not be able to cancel/terminate an individual health policy; all health policies will need to be cancelled/terminated at the same time
 - If cancelling/terminating health or dental coverage, only the entire health or dental policy can be cancelled
 - » In other words, the initial implementation of the API will not allow for member-level cancellation/termination of coverage
 - The API will allow for cancellation/termination of an individual dental policy, when multiple active health and dental policies exist
 - » The API will not however allow for dental-only coverage
 - In other words, if multiple health and dental policies exist, the health coverage cannot be cancelled/terminated without also cancelling/terminating the dental coverage

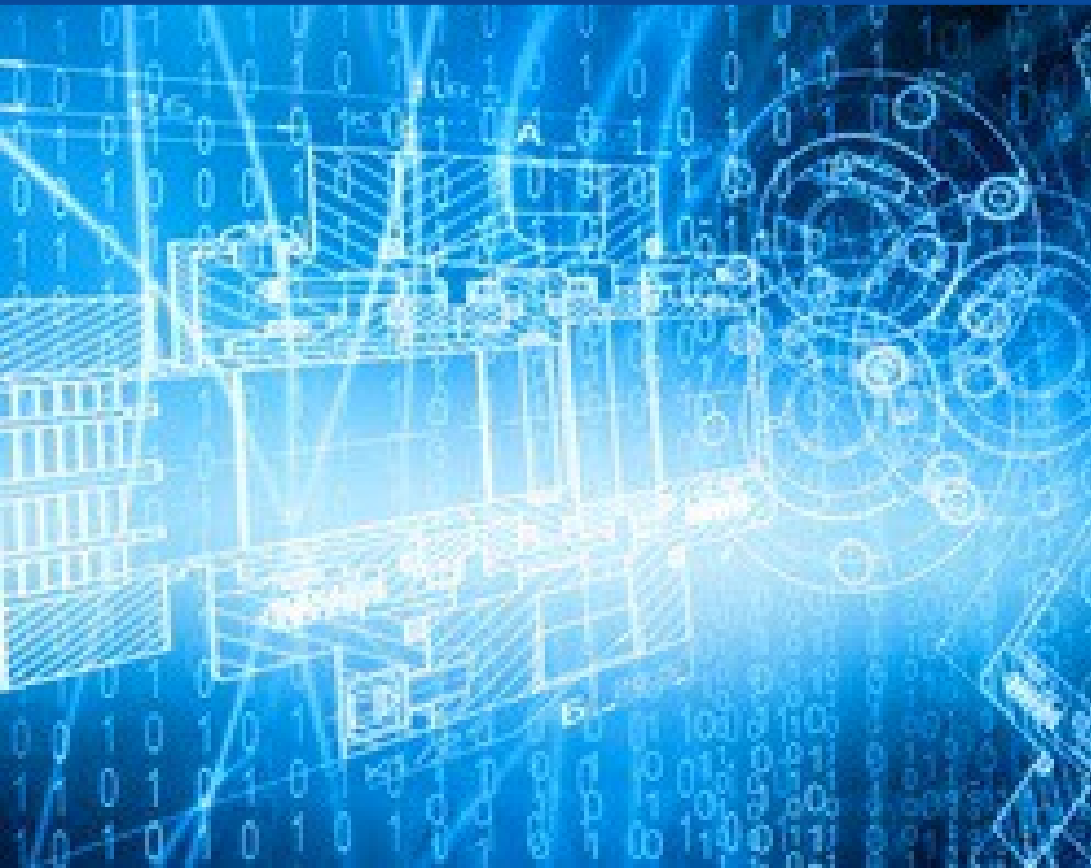
Reminder and Update for EDE Partners: New Update Policy API – Cancel/Termination Functionality

- **General Business Rules Continued:**
 - The FFM will derive whether the action is a cancellation or a termination based on the `actionEffectiveDate` provided in the Update Policy API request, however EDE Partners should be aware of the following:
 - Cancellation of a policy can only occur up until the coverage start date of the policy; the `actionEffectiveDate` for a cancellation will need to be either the coverage start date, or the day prior to the coverage start date
 - Termination of a policy can occur after the coverage start date, but the termination cannot be applied retroactively; the `actionEffectiveDate` for a termination will need to be either the date the termination is initiated or a future date
 - Cancellation of a Pended Plan Selection (PPS) can occur at any point while the PPS is still active; the `actionEffectiveDate` for a cancellation will need to be either the coverage start date, or the day prior to the coverage start date
 - **Update:** In situations where a consumer or a consumer's agent/broker is working with an EDE issuer, and the consumer has a PPS or policy that is not owned by the EDE issuer, the EDE issuer is permitted to either:
 - Display available details for the PPS or policy in the issuer's UI, and allow the user cancel/terminate the PPS or policy
 - » Note, issuers may only receive limited details for the PPS or policy in the Get Enrollment response
 - Or alternatively, display messaging to the user indicating that a PPS or policy exists that is owned by a different issuer, and that the user can go to HealthCare.gov or the FFE Call Center to cancel/terminate coverage
 - Classic DE users will continue to cancel/terminate through My Account on HealthCare.gov or via the FFM Call Center

Q&A



CMS Issuer Technical Workgroup Call Appendix



To view the full Appendix, please visit CMSzONE at the following url:
https://zone.cms.gov/system/files/documents/issuer_technical_slides_appendix_a_2018_3_20_v1.pdf