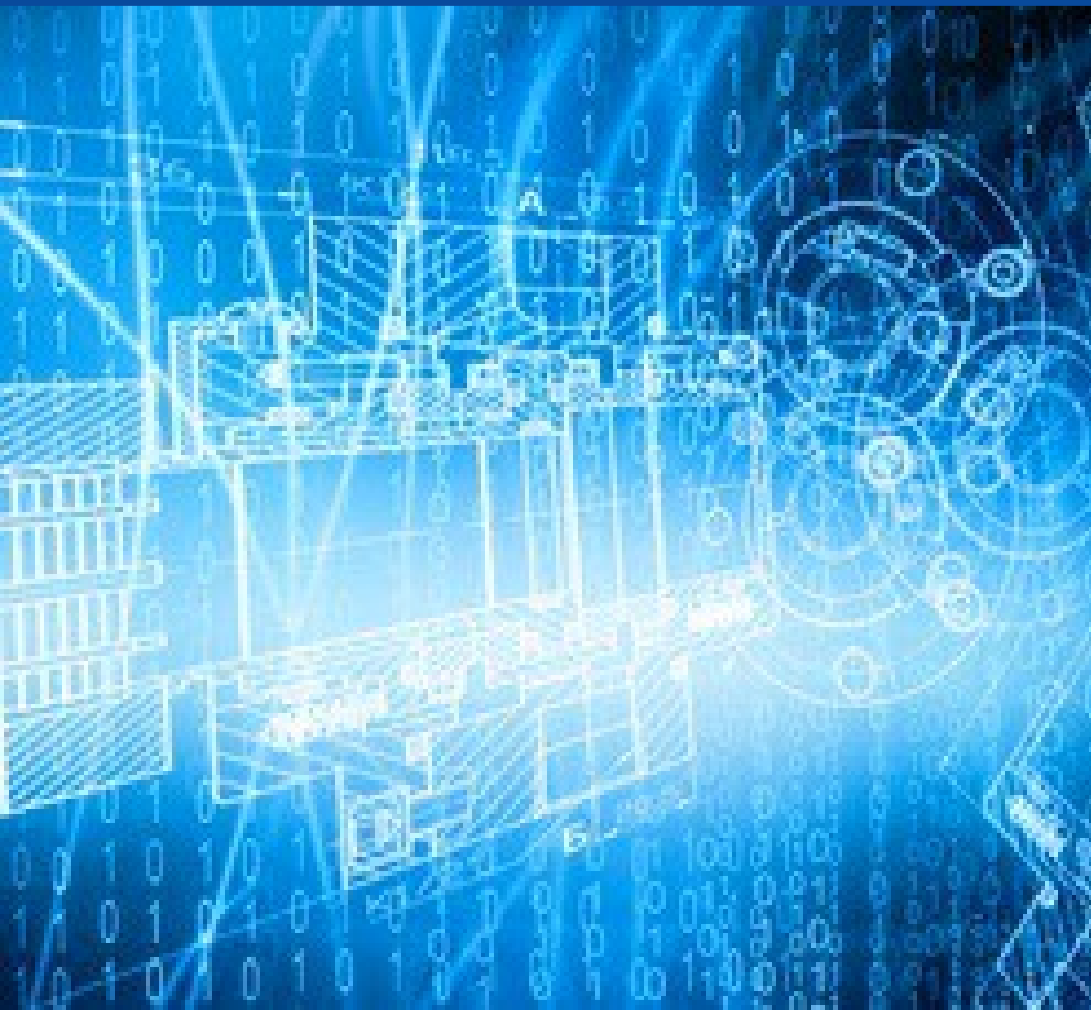


CMS Issuer Technical Work Group



- ***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:
Eligibility Team***
- ***Direct Enrollment (DE) Updates:
Enrollment Team***

- ***Q&A***

March 10, 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.

March 2020

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
01	02	03 CMS Issuer Technical Workgroup 3:00pm-4:30	04	05	06	07
08	09 CCIIO Enrollment Webinar(Policy Focus) 12:00pm-1:00pm	10 CMS Issuer Technical Workgroup 3:00pm-4:30	11	12 Data Recon & Inbound 834/BAA Workgroup 12:30-1:30pm	13	14
15	16	17 CMS Issuer Technical Workgroup 3:00pm-4:30	18	19 Data Recon & Inbound 834/BAA Workgroup 12:30-1:30pm	20	21
22	23 CCIIO Enrollment Webinar(Policy Focus) 12:00pm-1:00pm	24 CMS Issuer Technical Workgroup 3:00pm-4:30	25	26 Data Recon & Inbound 834/BAA Workgroup 12:30- 1:30pm	27	28
29	30	31 CMS Issuer Technical Workgroup 3:00pm-4:30	01 April	02 Data Recon & Inbound 834/BAA Workgroup 12:30-1:30pm	03	

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; Enrolment 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

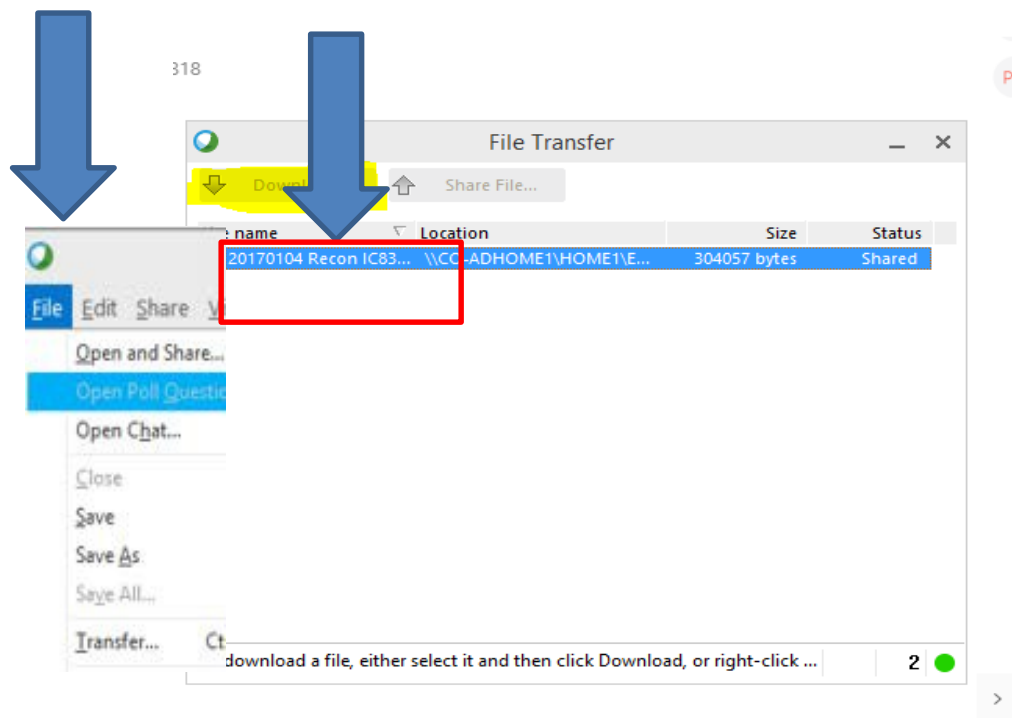
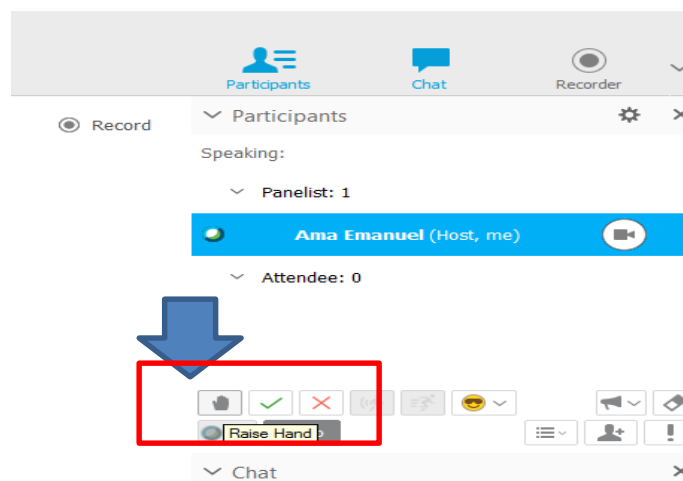
* There are some Issuers/DE Partners that may still experiencing problems after whitelisting. This is a known issue and we will report out once the issue is resolved.

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)

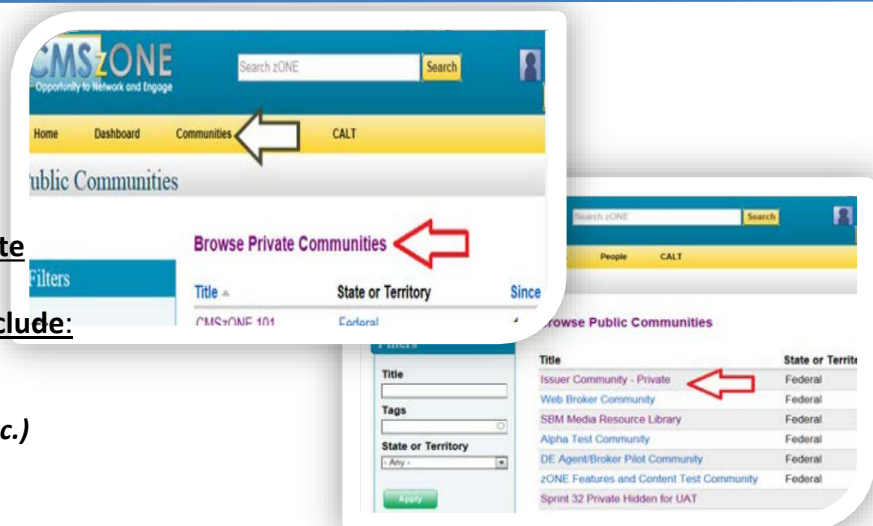
EIDM Registration Process: (Pre-requisite to CMSzONE Access)

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** Click **Issuer Community – Private**
3. Click **Join Community**
4. Provide explanation of why you need access to this community; **Include:**
5.
 - 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, March 10, 2020

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ER&R Topics

- ✓ *Topics*
- ✓ *2019 Policies: Prior Year and Account Manager Approval*
- ✓ *Q&A*

***Tuesday, March 10,
2020***

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2019 Policies: Prior Year and Account Manager Approval

- 2019 disputes are considered prior year starting April 1, 2020.
- When submitting disputes for 2019 records after April 1, 2020, issuers should:
 - Use the correct dispute type when changing end dates.
 - Refrain from using dispute types that are reserved for current year records.
 - Consider using the FFM Exchange Assigned Policy ID and Segment ID fields instead of the FFM Internal Record Inventory Number field.
- Starting on May 1, 2020, issuers will need to send completed Issuer Prior Year Approval Request Forms to their Account Managers to submit 2019 disputes to ER&R.
 - For more information regarding requesting Account Manager approval for Prior Year disputes or to download the request form, issuers should access the [poryeardisputeapprovalmasterguidance.pptx](https://zone.cms.gov/document/enrollment-resolution-and-reconciliation) and [issuerporyearapprovalrequest_final_5.28.2019.xlsx](https://zone.cms.gov/document/enrollment-resolution-and-reconciliation) files on zONE at <https://zone.cms.gov/document/enrollment-resolution-and-reconciliation>.

Enhanced Direct Enrollment (EDE) Updates: Eligibility Team



***Tuesday, March 10,
2020***

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EDE Partners – Upcoming SES API Changes

- As previously announced, R18 SES will be making changes to flow and service level validations.
- On Wednesday, March 4, a new iteration of the App Services Companion Guide was posted to zONE at <https://zone.cms.gov/document/enhanced-direct-enrollment-edo-documents-and-materials>.
- We urge partners to review the validation changes to ensure that your API requests will not return SES errors.

SES Release 18 changes will be deployed to UAT0 on March 13, 2020 and will be deployed into production on May 1, 2020.

EDE Partners – Upcoming SES API Changes

Highlighting two non-breaking changes. These are validations that were loosened, so EDE partners have more flexibility in what consumers can attest to without error

- **Firstname** field
 - Character limit increased to 35 characters (this was previously 25 characters)
- **divorceDate** and **deathDate** fields
 - These are optional fields that can be provided in a Remove Member API request. The validation change allows dates further in the past to be provided. An error will be triggered when the date entered is before 10/1/2013 (i.e., before the **first** open enrollment period date)

Direct Enrollment (DE) Updates: Enrollment Team



Tuesday, March 10, 2020

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EDE Partners: BAR Opt-Out Functionality Coming Soon to the Update Policy API

- **Background:**
 - The intent of the BAR opt-out functionality is to allow consumers to specifically opt-out of auto re-enrollment for next year's coverage, effectively ending their coverage at the end of the current year
 - BAR opt-out is displayed for applications with at least 1 BAR-eligible policy (active policy, not cancelled or terminated)
 - This functionality is dynamically displayed between a configurable date range, normally between early October and the end of the year (~10/6-12/31)
 - If a consumer is opting out of BAR, they currently need to opt out of BAR for all policies tied to the application; policy-level and/or member-level BAR opt-out is not currently supported
- **EDE Partner implementation of BAR opt-out functionality:**
 - EDE implementation of BAR opt-out functionality is expected to be required
 - A required implementation deadline has not yet been determined, however the implementation deadline will likely be prior to OE this year
 - BAR opt-out will be an additional action within the Update Policy API
 - UATO deployment of BAR opt-out functionality is expected to occur in early April of this year (confirmed deployment date is TBD)
 - Production deployment of BAR opt-out functionality is expected to occur on May 1st, 2020
 - Again, EDE Partners will likely receive an implementation deadline that is later in the year

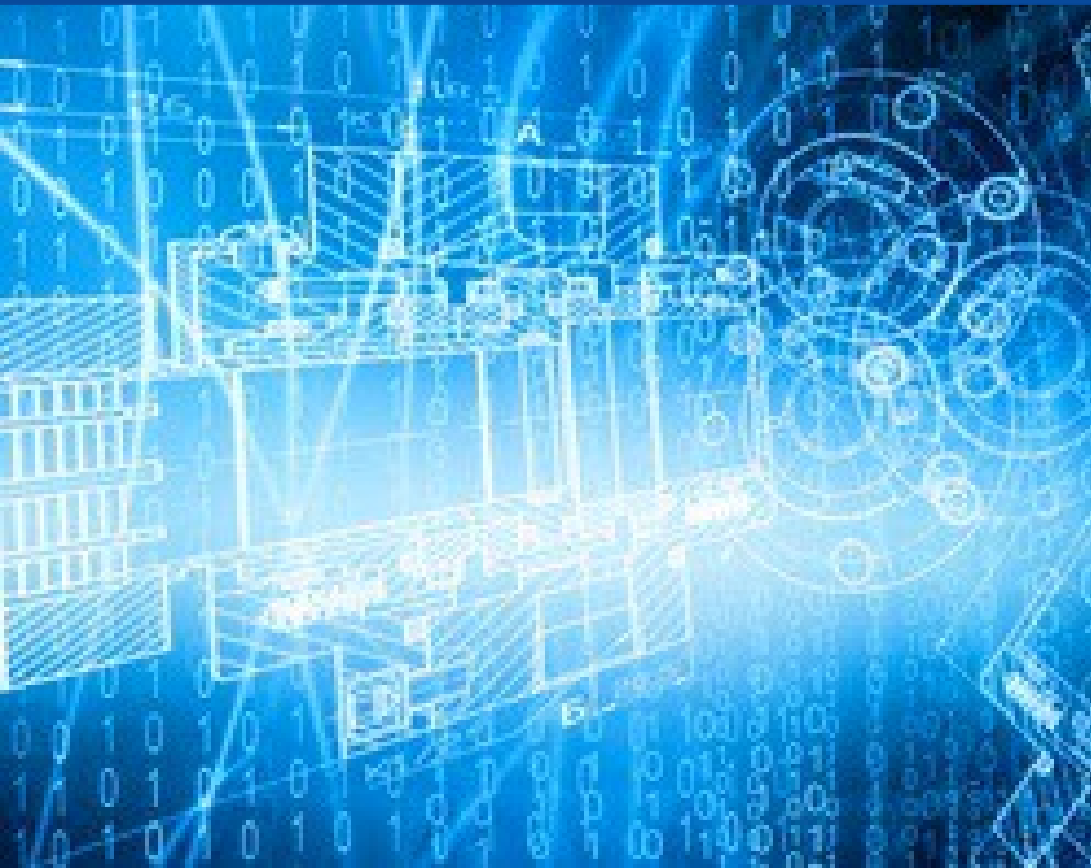
EDE Partners: BAR Opt-Out Functionality Coming Soon to the Update Policy API – BAR Opt-Out Scenarios

Scenario Description	Display BAR Opt-Out?	Result of BAR Opt Out
Application with: No enrollments tied to it	No	N/A
Application with: No active enrollments tied to it (i.e. cancelled/terminated enrollments only)	No	N/A
Application with: Active BAR-eligible enrollments tied to it, but outside of configurable BAR opt-out window	No	N/A
Application with: - Active BAR-eligible enrollments tied to it, and inside of configurable BAR opt-out window - BAR has not occurred	Yes	- Current year policy is terminated with a 12/31 termination date (EOY indicator = true) - BAR will not be processed
Application with: - Active BAR-eligible enrollments tied to it, and inside of configurable BAR opt-out window - BAR has occurred	Yes	- Current year policy is terminated with a 12/31 termination date (EOY indicator = true) - Future year BAR policy is cancelled

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