


**Centers for Medicare & Medicaid Services**

**Center for Consumer Information and Insurance Oversight (CCIIO)**

# EDGE Server Truncation Request Web Form Guide

**9/18/17**

# Resources

The following External Data Gathering Environment (EDGE) Server truncation request resources are available for review or download:

- EDGE Server Truncation Request Web Form: https://acapaymentoperations.secure.force.com/EDGEServerTruncation
- EDGE Server Contact Database: https://acapaymentoperations.secure.force.com/EdgeContactDatabase
- Download and review the EDGE Server Truncation Request webinar training materials from the Registration for Technical Assistance Portal (REGTAP) library in the "Distributed Data Collection for RI and RA/Edge Server" Program Area: https://www.regtap.info

# 1. Introduction

Issuers participating in the Federally-Facilitated Exchange (FFE) are allowed to submit a request for truncation of EDGE Server data. The Centers for Medicare & Medicaid Services (CMS) has developed the EDGE Server Truncation Request web form for issuers requesting an EDGE Server truncation or an extension for a previously-approved truncation request. CMS will review truncation and truncation extension requests and provide notification and instructions to issuers.

The EDGE Server Truncation Request web form link will be emailed to company Chief Executive Officer (CEO) Designates and Alternate CEO Designates. If your company's CEO Designate has changed, you must ensure the contact information has been updated in the EDGE Server Contact Database. The web form must be completed and submitted in a single session. It is recommended that you collect all necessary information before initiating the process.

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

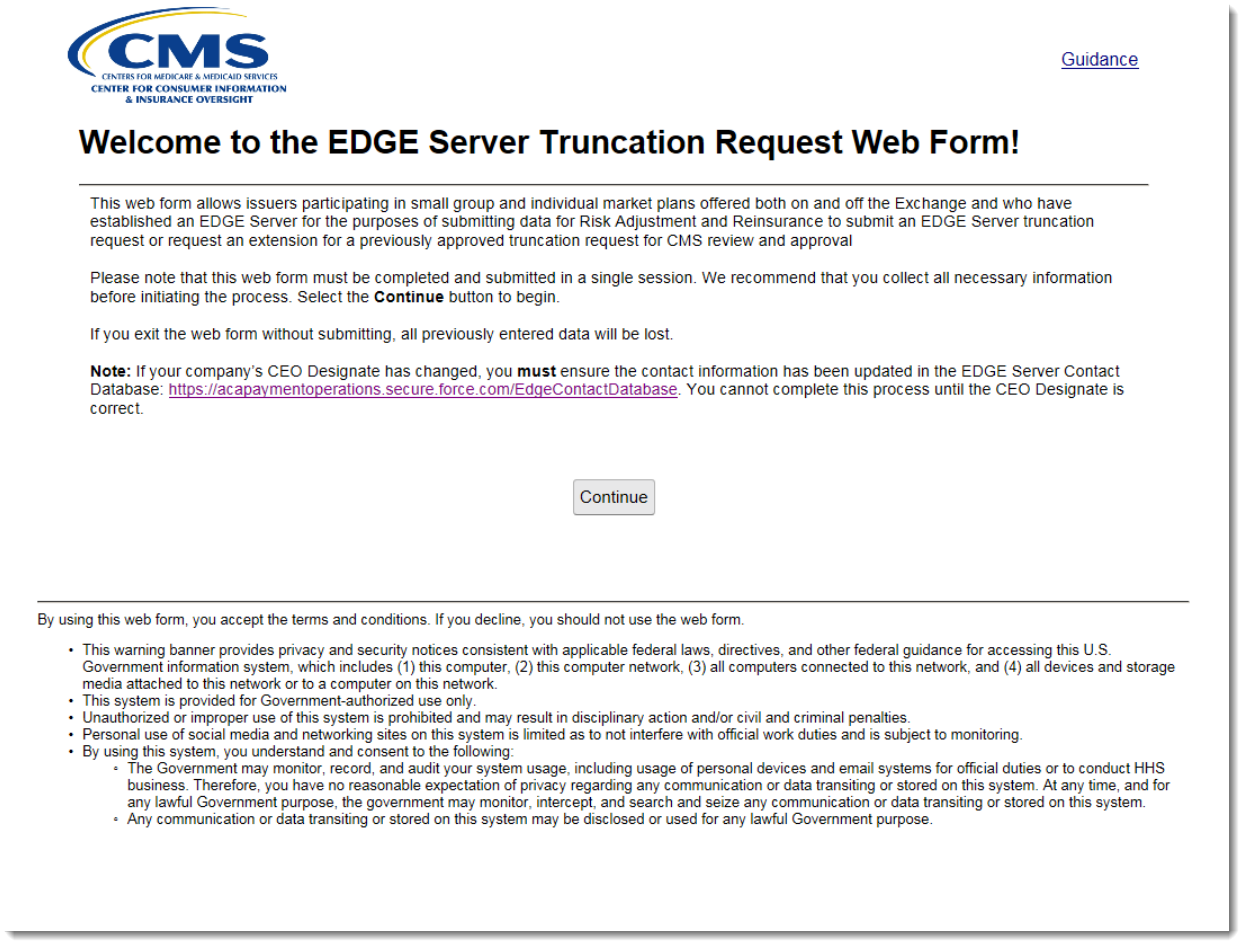


The web form is optimized for use with Google Chrome™ or Firefox®. Internet Explorer® may be used but some form features, such as error messaging, may not function properly.

# 2. Welcome Page

Upon selecting the web form link in the invitation email, you are directed to the Welcome page of the web form as shown in Figure 1. Review the instructions and select the **Continue** button to advance to the Contact Information page.

**Figure 1: Welcome Page**



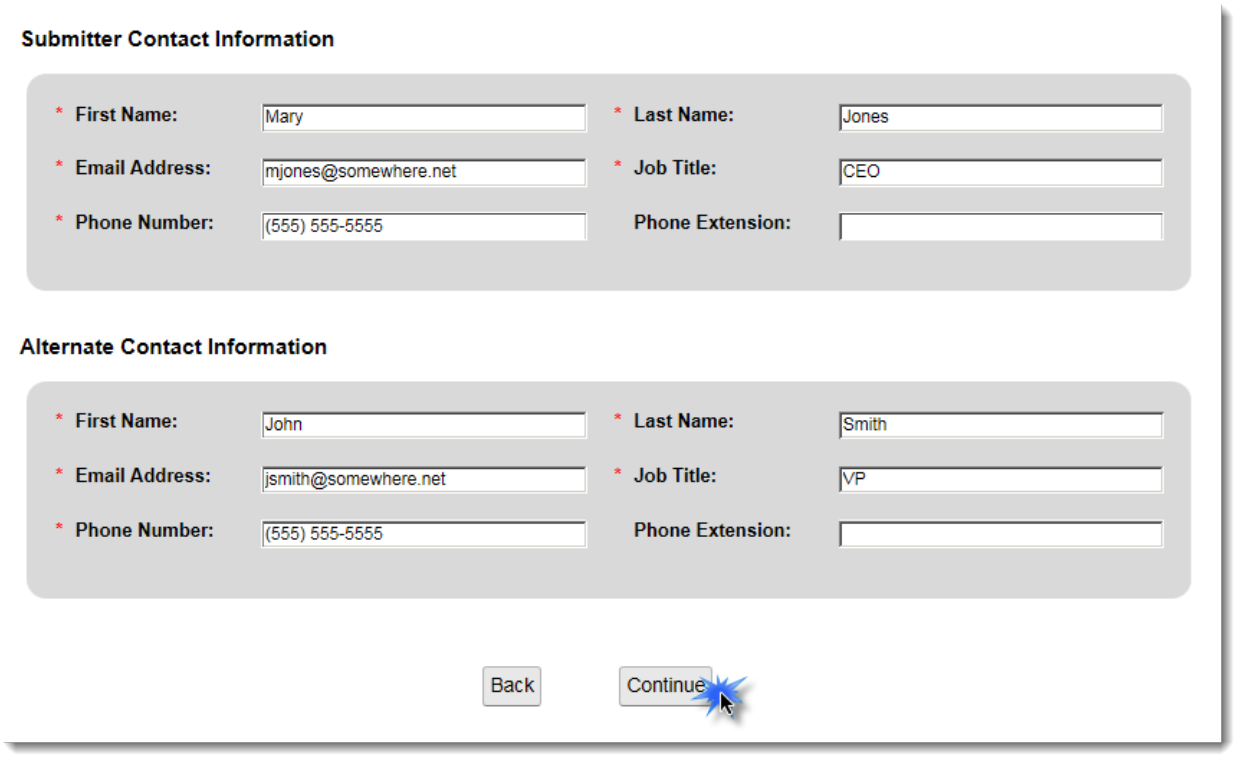
# 3. Contact Information Page

The Contact Information page collects Submitter and Alternate Contact information, as shown in Figure 2. You may enter the CEO Designate contact information as either the Submitter Contact or as the Alternate Contact. The Submitter and Alternate Contact cannot be the same.

**Table 1: Contact Information Page Steps**

| Step | Action |
|---|---|
| **1** | Enter the Submitter Contact information:<br>• First Name<br>• Last Name<br>• Email Address<br>• Job Title<br>• Phone Number<br>• Phone Extension (optional) |
| **2** | Enter the Alternate Contact information (must be different from the Submitter Contact):<br>• First Name<br>• Last Name<br>• Email Address<br>• Job Title<br>• Phone Number<br>• Phone Extension (optional) |
| **3** | Select the **Continue** button.<br>You will be directed to the EDGE Server Truncation Request Type page of the form. |

Figure 2: Contact Information Page



# 4. EDGE Server Truncation Request Type Page

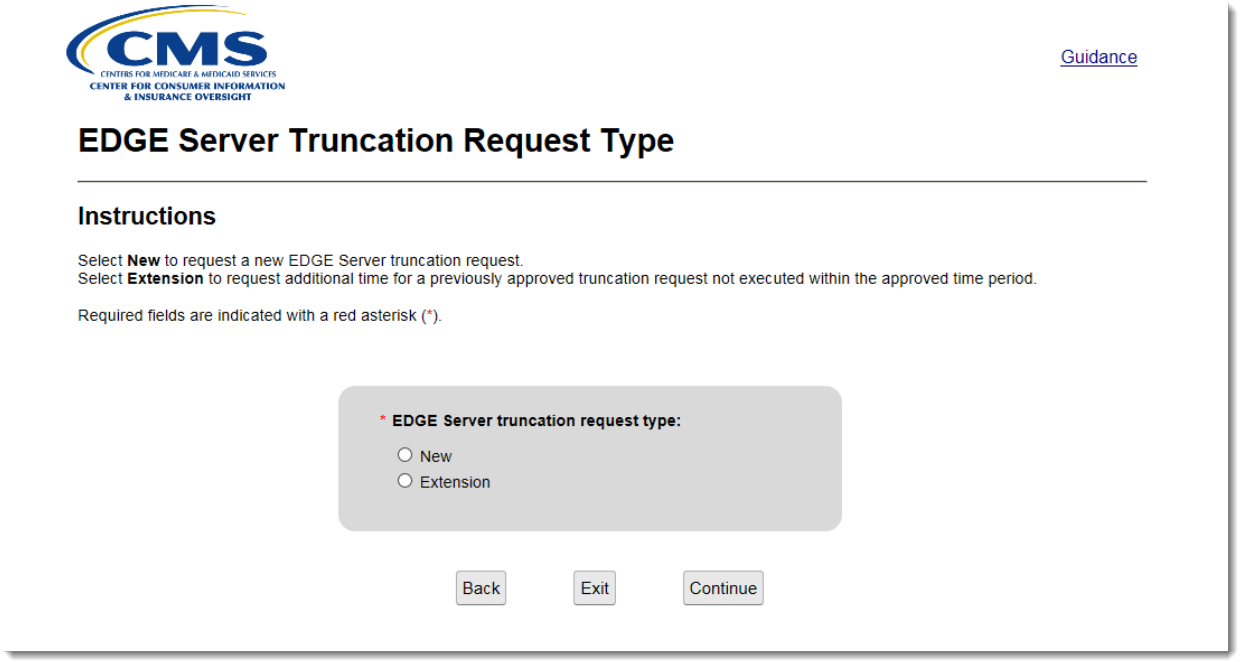
The EDGE Server Truncation Request Type page provides the option to make a new request for EDGE Server truncation or request an extension for a previously-approved truncation request, as shown in Figure 3. Select the option appropriate to your company's request, and then select the **Continue** button to proceed to the page of the form indicated by Table 2.

**Table 2: EDGE Server Truncation Request Type Navigation**

| If | Then | Reference |
|---|---|---|
| The **New** request option is selected, | The form will proceed to the New EDGE Server Truncation Request page. | Section 5 |
| The **Extension** request for a previously-approved truncation request option is selected, | The form will proceed to the EDGE Server Truncation Extension Request page. | Section 6 |

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.

**Figure 3: EDGE Server Truncation Request Type Page**



# 5. New EDGE Server Truncation Request

This section provides instructions on how to make a new request for EDGE Server truncation.

## 5.1. New EDGE Server Truncation Request Page

The New EDGE Server Truncation Request page requires entry of information related to the type and reasoning behind your truncation request, as shown in Figure 4 and Figure 5. Follow the steps in Table 3 to complete this information.

**Table 3: New EDGE Server Truncation Request Steps**

| Step | Action |
|---|---|
| 1 | Select one of the following from the **Select the EDGE Server truncation zone** drop-down list:<br>• Production zone<br>• Test zone<br>• Validation zone |
| 2 | Select the appropriate radio button from the **Select the EDGE Server truncation request category**:<br>• **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.<br>• **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.<br>• **Issuer/TPA implementing new logic** - The Issuer/TPA has updated programming logic which requires a full reload of data.<br>• **Other** |
| 3 | Enter 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.<br> If you selected the **Functionality does not exist, must resubmit** radio button (see Step 2), please provide a brief explanation as to when you plan to implement a solution that brings you in to compliance. |

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Enter the planned truncation date in the When do you plan to do the truncation? field. This date must be at least one business day from today's date.</td></tr>
<tr><td>5</td><td>Enter your desired date range in the Requested date range for server truncation field. This field is optional. If entered, the date range must include the planned truncation date (entered in Step 4).</td></tr>
<tr><td>6</td><td>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.</td></tr>
<tr><td>7</td><td>Select Yes or No from the Are your new files ready for submission? drop-down list.</td></tr>
<tr><td>8</td><td>Select Yes or No from the Have you run your data through the test zone? drop-down list.
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Yes</td><td>The What were the test results? field is required. Enter your test results here. This field has a limit of 1,500 characters.</td></tr>
<tr><td>No</td><td>Continue to Step 9.</td></tr>
</table>
</td></tr>
<tr><td>9</td><td>Select Yes or No from the Have you performed a back-up of your data on an external location/site? drop-down list.</td></tr>
<tr><td>10</td><td>Select the HIOS ID(s) for which you are requesting the EDGE Server truncation from the Available HIOS ID(s) list and then select the right facing arrow button → to move it to the Selected HIOS ID(s) list.<br>Select the double right facing arrow →→ to select all HIOS IDs in the list. To de-select a HIOS ID, select the left facing arrow button ← to move the HIOS ID from the Selected HIOS ID(s) list to the Available HIOS ID(s) list. Select the left facing double arrow ←← to de-select all HIOS IDs in the Selected HIOS ID(s) list.<br>You may filter the list of HIOS IDs by entering the HIOS ID or issuer legal business name in the Filter field.</td></tr>
<tr><td>11</td><td>Enter any FMCC case numbers, separated by commas, in the If you have an FMCC case number related to the EDGE Server truncation request, enter it here field. This field is optional and has a limit of 100 characters.</td></tr>
<tr><td>12</td><td>Select the Continue button.<br>You will be directed to the Summary page of the form.</td></tr>
</table>

Figure 4: New EDGE Server Truncation Request Page

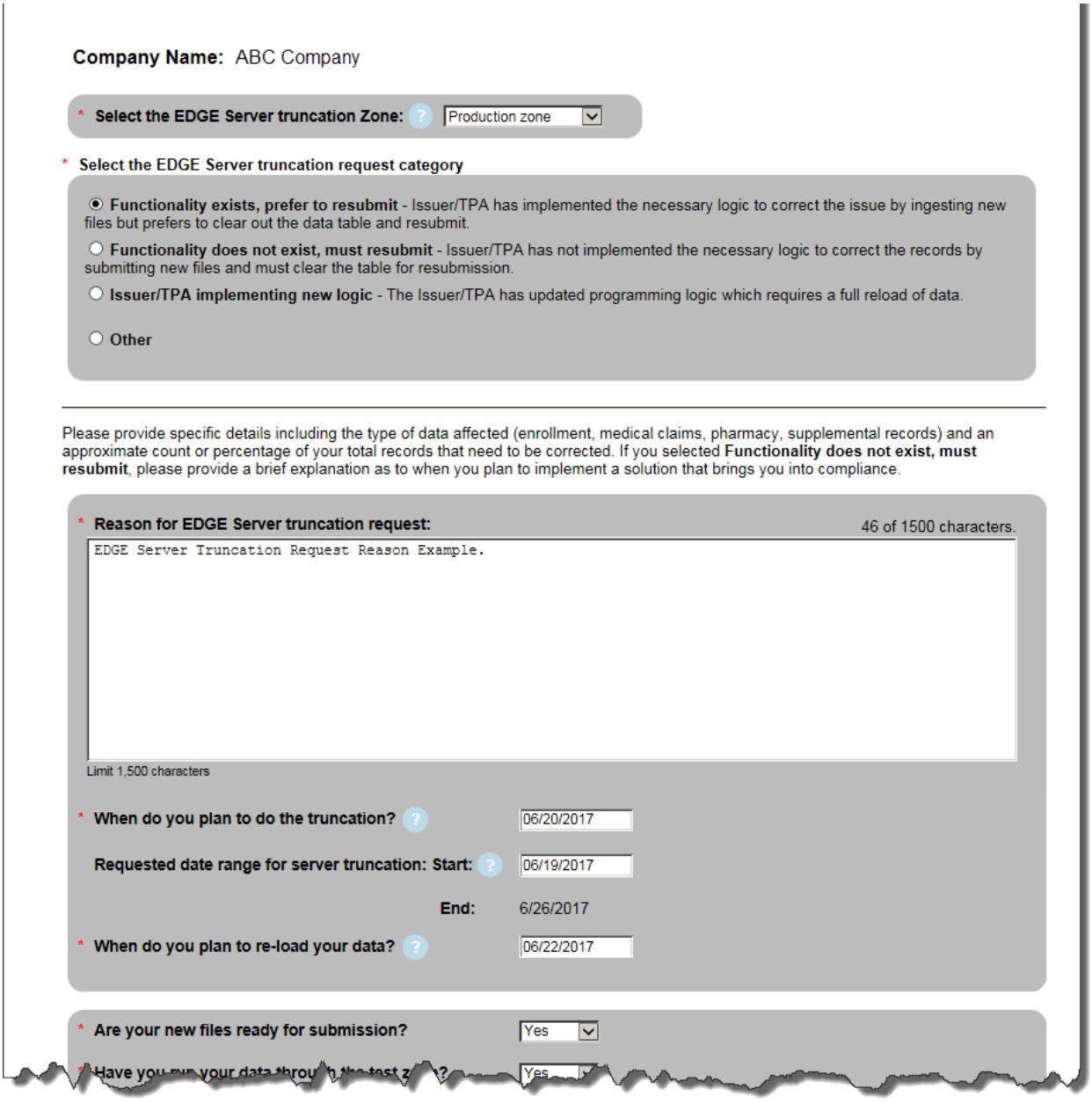
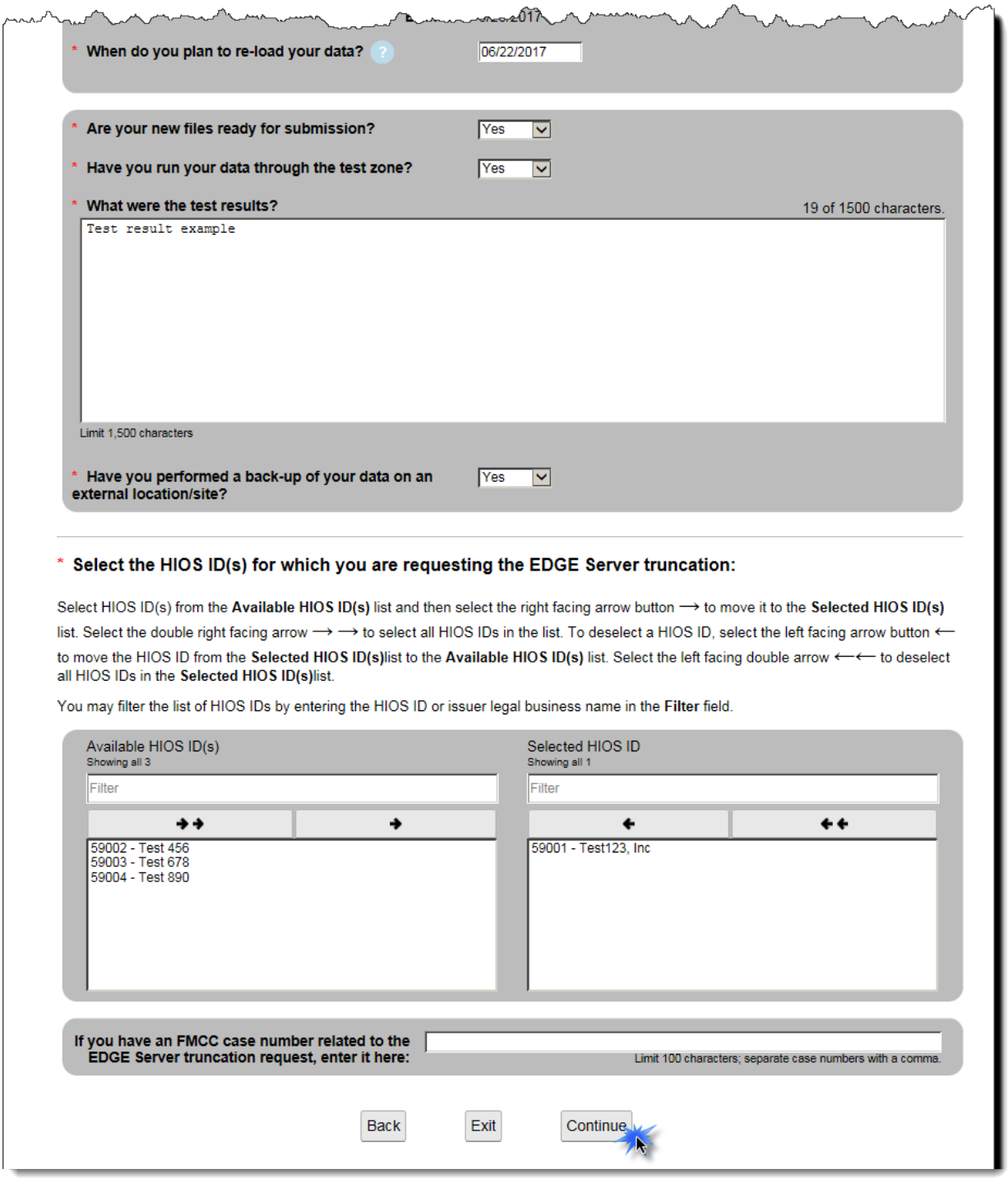


Figure 5: New EDGE Server Truncation Request Page, continued



## 5.2. Summary Page

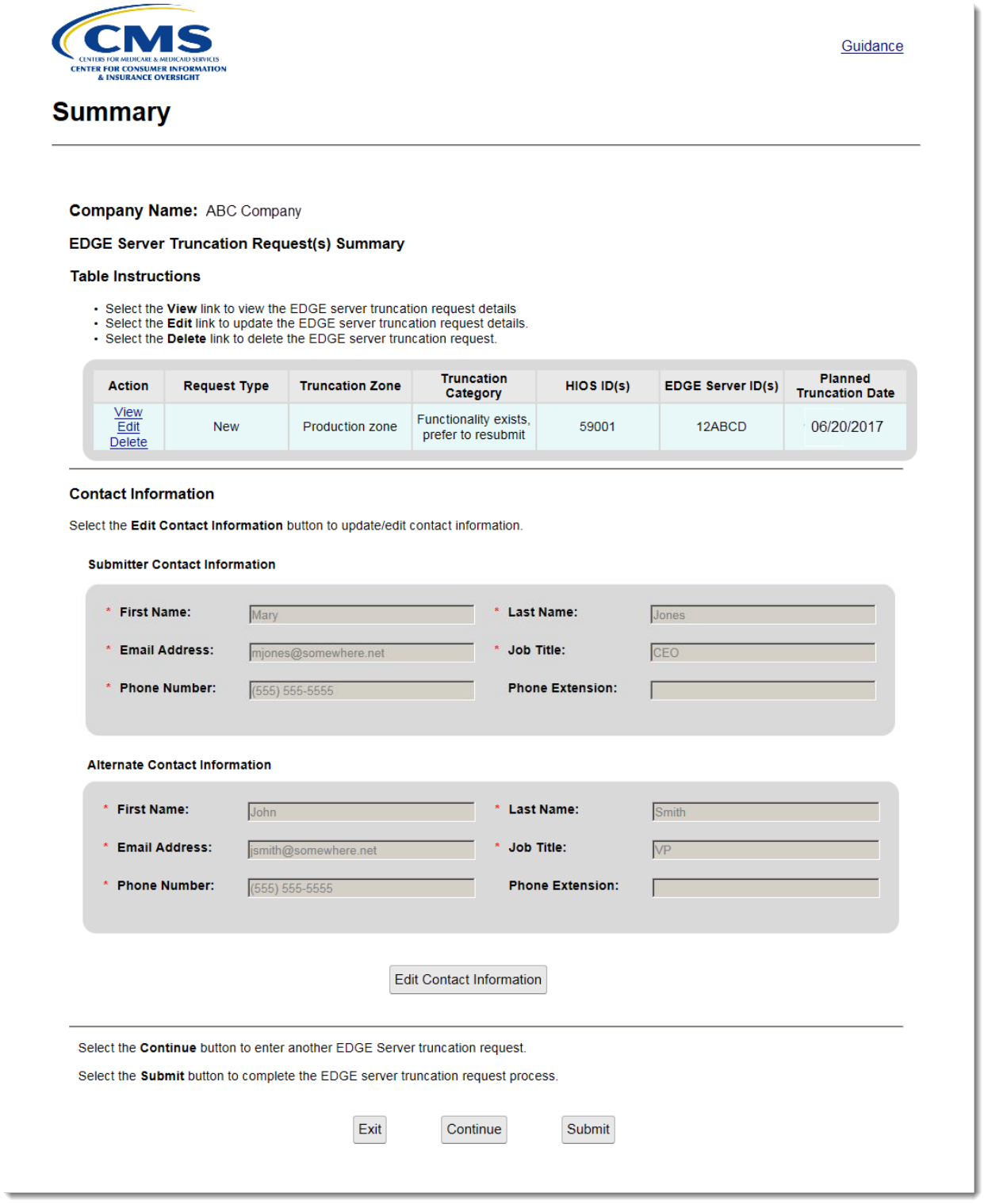
The Summary page allows you to view and edit EDGE Server truncation request details and contact information, as indicated in Table 4. See Figure 6 for the screen details.

**Table 4: Summary Page Steps**

| Step | Action |
|---|---|
| 1 | Review the **EDGE Server Truncation Request(s) Summary** table, which contains the details of each truncation request entered during this web form session. In the **Action** column, select the appropriate link as needed.<br>• Select the **View** link to view the EDGE Server truncation request details.<br>• Select the **Edit** link to update the EDGE Server truncation request details.<br>• Select the **Delete** link to delete the EDGE Server truncation request. |
| 2 | Review the Contact information summary. If needed, select the **Edit Contact Information** button to update the information. |
| 3 | Select the appropriate button to proceed: |

| If | Then |
|---|---|
| You need to enter another truncation request, | Select the **Continue** button to enter another EDGE Server truncation request. The form will proceed to the EDGE Server Truncation Request Type page (see Section 4). |
| You have finished entering your truncation request(s), | Select the **Submit** button to complete the EDGE Server truncation request process. The form will proceed to the Confirmation page (continue to Section 5.3). |

Figure 6: Summary Page



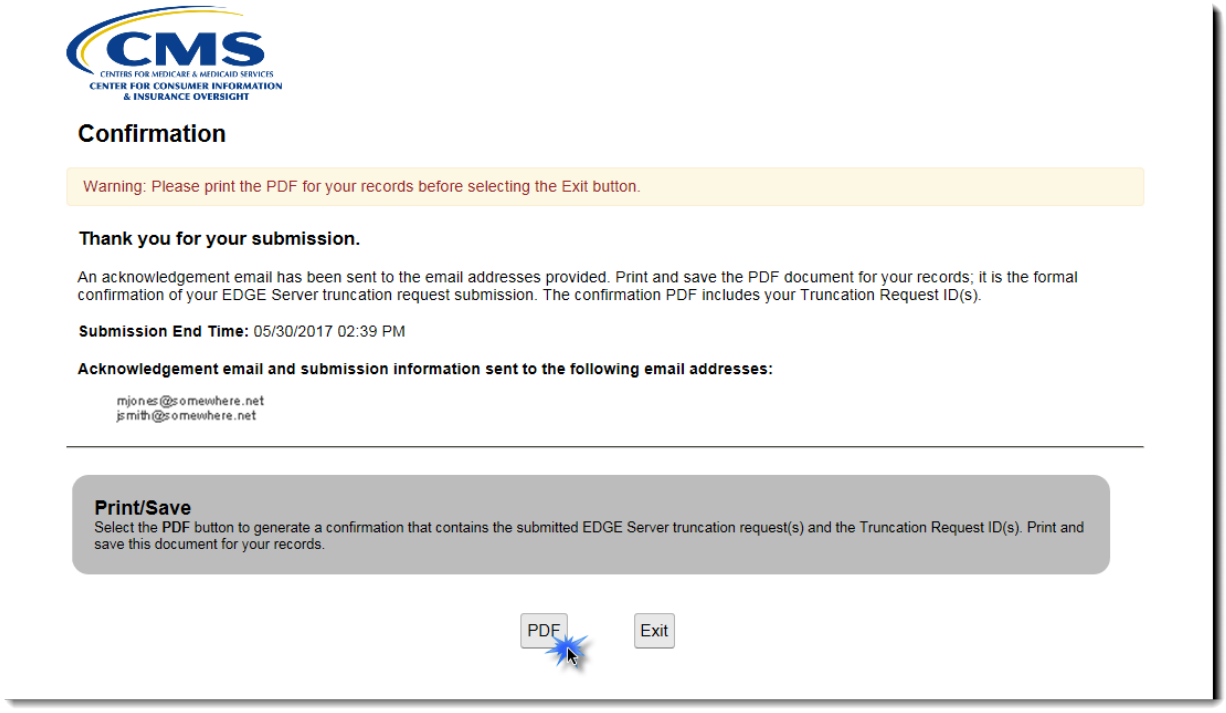
## 5.3. Confirmation Page

After selecting the **Submit** button on the Summary page, an acknowledgement email will be sent to the email addresses provided. The PDF is the formal confirmation of your EDGE Server truncation request submission. It is recommended that you save and print a PDF of the confirmation for your records following the steps in Table 5.

**Table 5: Confirmation Page Steps**

| Step | Action |
|---|---|
| 1 | Select the **PDF** button to print/save the confirmation for your records. |
| 2 | Once your confirmation has been printed and/or saved, select the **Exit** button to exit the web form. |

**Figure 7: Confirmation Page**



# 6. EDGE Server Truncation Extension Request

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

## 6.1. EDGE Server Truncation Extension Request Page

The EDGE Server Truncation Extension Request page requires entry of the previous **Truncation Request ID** to populate information from that request, as shown in Figure 8 and Figure 9. Follow the steps in Table 6 to process your extension request.

**Table 6: EDGE Server Truncation Extension Request Page Steps**

| Step | Action |
|---|---|
| 1 | Enter the ID from your previously submitted request in the **Truncation Request ID field**. This was included in the approval email from CMS. If you cannot locate your Truncation Request ID, please send an email to raripaymentoperations@cms.hhs.gov. Include at least one HIOS ID and the words "EDGE truncation" in the subject line.<br>Select the **Verify** button to continue. |
| 2 | Provide specific details, including 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 extension** field. This field has a limit of 1,500 characters. |
| 3 | Enter the planned truncation date. This date must be at least one business day from today's date in the **When do you plan to do the truncation?** field. |
| 4 | Enter your desired date range in the **Requested date range for server truncation** field. This field is optional. If entered, the date range must include the planned truncation date (entered in Step 3). |
| 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. |
| 6 | Select **Yes** or **No** from the **Are your new files ready for submission?** drop-down list. |
| 7 | Select **Yes** or **No** from the **Have you run your data through the test zone?** drop-down list. |

| If | Then |
|---|---|
| Yes | The **What were the test results?** field is required. Enter your test results here. This field has a limit of 1,500 characters. |
| No | Continue to Step 8. |

| Step | Action |
|---|---|
| 8 | Select **Yes** or **No** from the **Have you performed a back-up of your data on an external location/site?** drop-down list. |
| 9 | Enter any FMCC case numbers, separated by commas, in the **If you have an FMCC case number related to the EDGE Server truncation request, enter it here** field. This field is optional and has a limit of 100 characters. |
| 10 | Select the **Continue** button.<br>You will be directed to the Summary page of the form. |

Figure 8: EDGE Server Truncation Extension Request Page

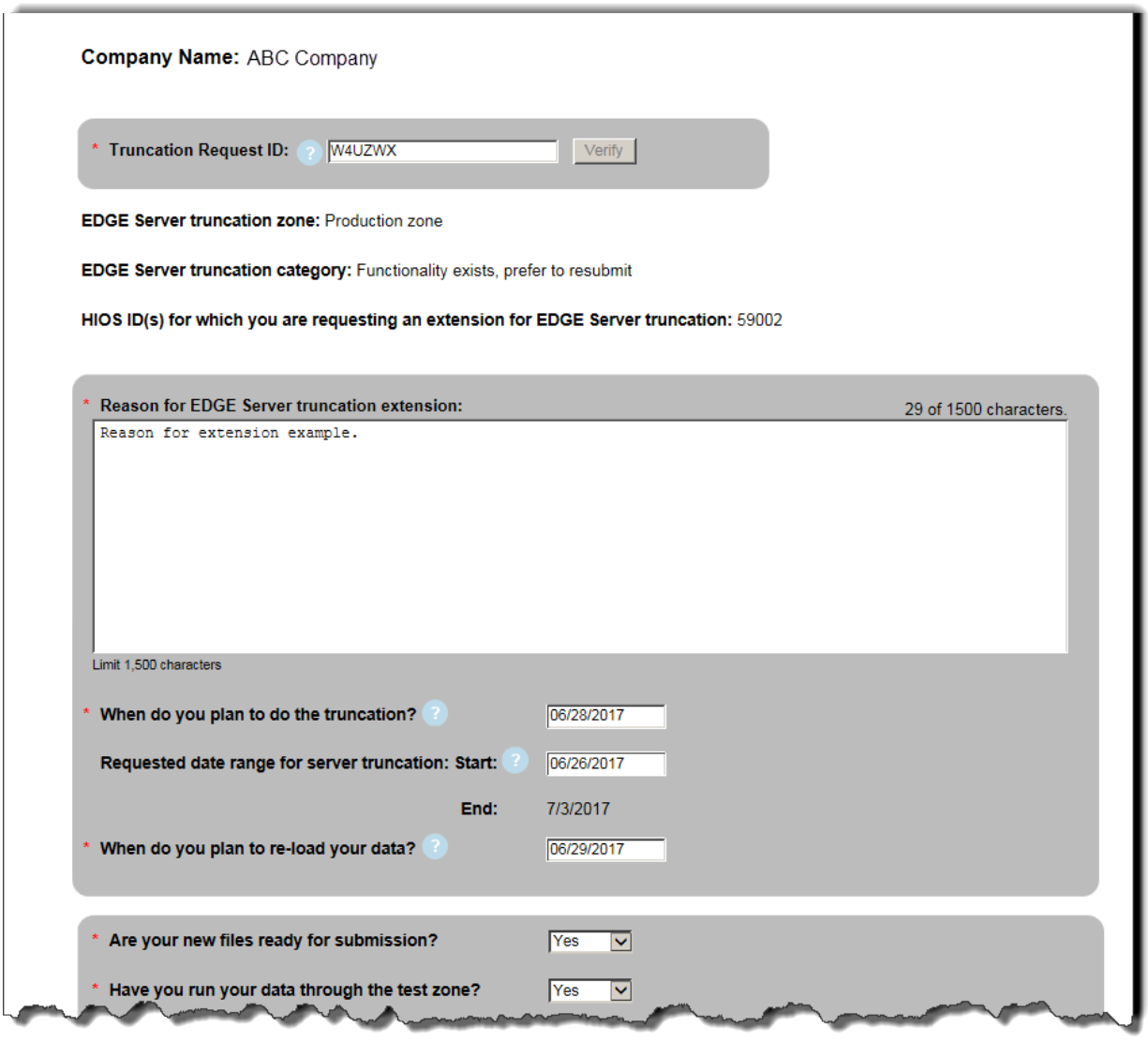
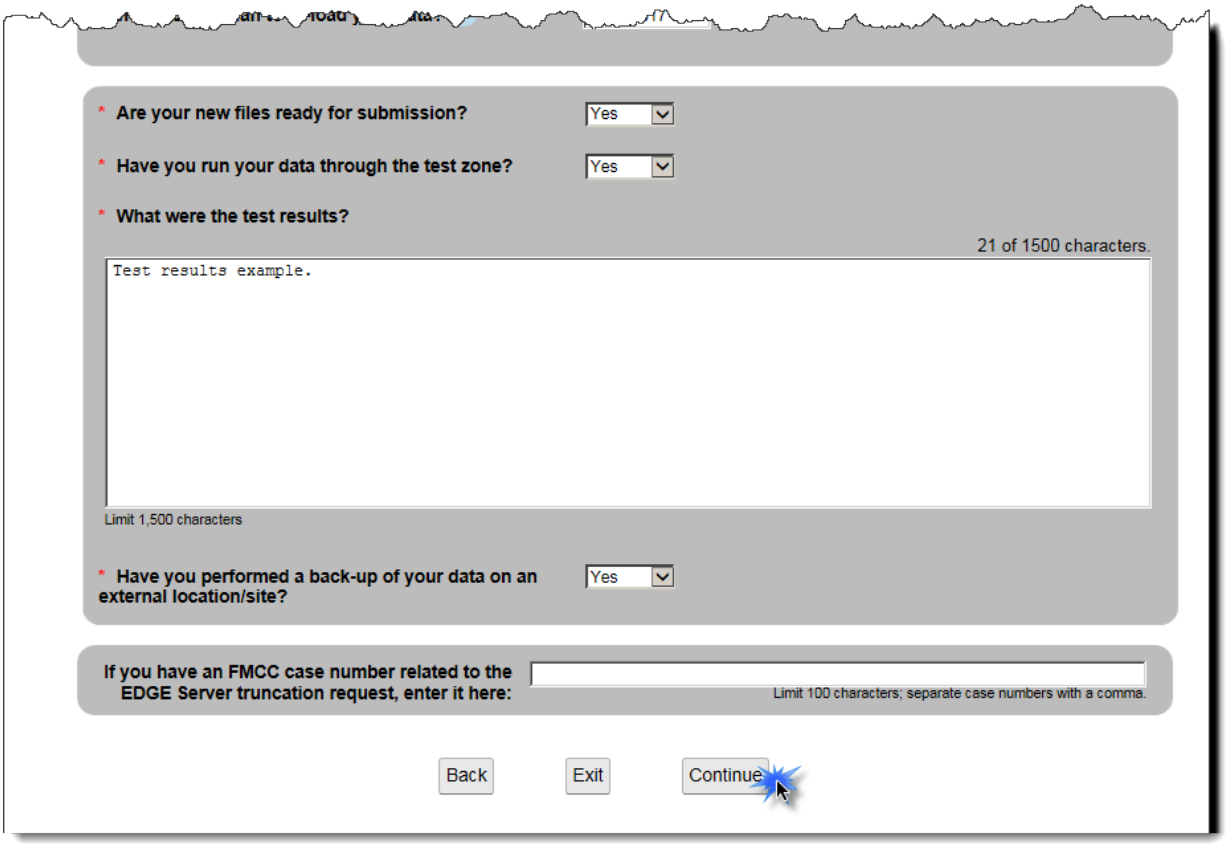


Figure 9: EDGE Server Truncation Extension Request Page, continued



## 6.2. Summary Page

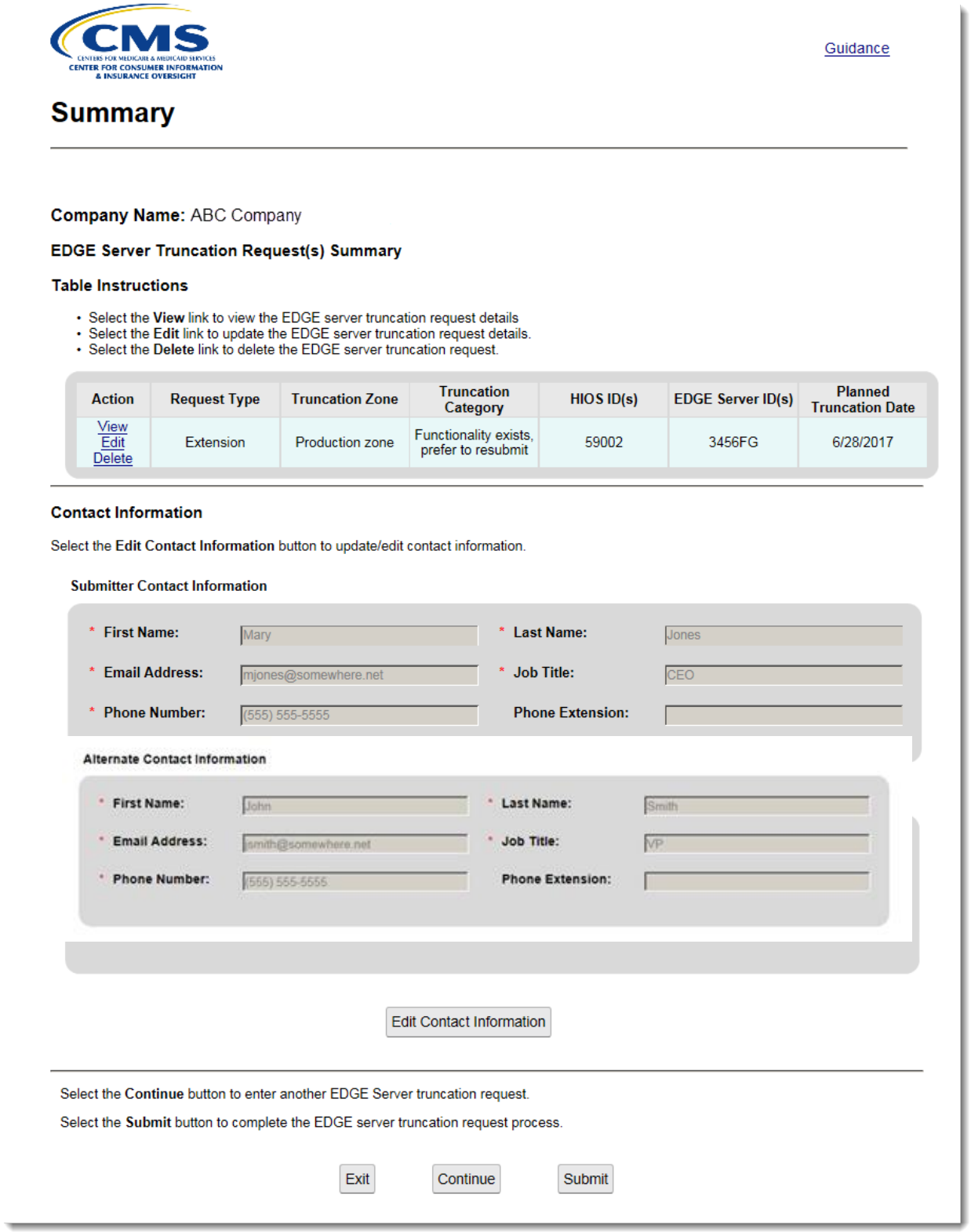
The Summary page allows you to view and edit EDGE Server truncation request details and contact information.

**Table 7: Summary Page Steps**

| Step | Action |
|---|---|
| 1 | Review the **EDGE Server Truncation Request(s) Summary** table, which contains the details of each truncation request entered during this web form session. In the **Action** column, select the appropriate link as needed.<br>• Select the **View** link to view the EDGE server truncation request details.<br>• Select the **Edit** link to update the EDGE server truncation request details.<br>• Select the **Delete** link to delete the EDGE server truncation request. |
| 2 | Review the Contact information summary. If needed, select the **Edit Contact Information** button to update the information. |
| 3 | Select the appropriate button to proceed: |

| If | Then |
|---|---|
| You need to enter another truncation request, | Select the **Continue** button to enter another EDGE Server truncation request. The form will proceed to the EDGE Server Truncation Request Type page (see Section 4). |
| You have finished entering your truncation request(s), | Select the **Submit** button to complete the EDGE Server truncation request process. The form will proceed to the Confirmation page (continue to Section 6.3). |

Figure 10: Summary Page



## 6.3. Confirmation Page

After selecting the **Submit** button on the summary page, an acknowledgement email will be sent to the email addresses provided. It is recommended that you save and print a PDF of the confirmation for your records. The PDF is the formal confirmation of your EDGE Server truncation request submission.

Table 8: Confirmation Page Steps

| Step | Action |
|---|---|
| 1 | Select the **PDF** button to print/save the confirmation for your records. |
| 2 | Once your confirmation has been printed and/or saved, select the **Exit** button to exit the web form. |

Figure 11: Confirmation Page

