# DISTRIBUTED DATA COLLECTION (DDC) FORREINSURANCE (RI) AND RISK ADJUSTMENT (RA): EDGE SERVER OPERATIONS & MAINTENANCE MANUAL (O&MM)

## June 12, 2018

**Health Insurance Exchange Program Training Series**

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# Session Agenda

- Purpose
- Session Guidelines
- Intended Audience
- New Webinar Platform
- EDGE Server Timeline
- EDGE Server O&MM: Overview
- Open Question and Answer (Q&A)
- Resources
- Closing Remarks

# Session Guidelines

- This is a 90-minute webinar session.
- For technical questions, please submit inquiries to: EDGE_Server_Data@cms.hhs.gov.
  - Include EDGE Server and the Health Insurance Oversight System (HIOS) ID in the subject line.
- For questions regarding logistics and registration, please contact the Registrar at: (800) 257-9520.

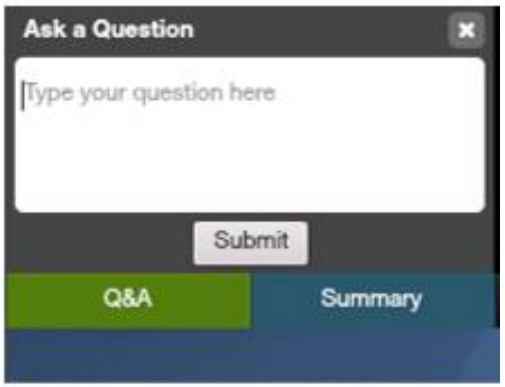
# New Webinar Platform

- Use Internet Explorer when accessing the new web platform.
- Test your system's compatibility, use the following link: http://engage.vevent.com/microsite/ext/self_test.jsp?eid=140
- If you cannot hear today's audio or having other technical issues, please contact the Registrar Support Team at registrar@regtap.info or 1 (800) 257-9520.

# New Webinar Platform (continued)

- To submit questions, use the Q&A panel, and CMS Subject Matter Experts will respond during the webinar or afterwards as needed.



# New Webinar Platform (continued)

- **Can I still use a landline phone to listen?**

No, the audio for the webcast will stream via your computer or smart device (Apple or Android), so you will need speakers or headphones to listen.

- **Can I call from a cell phone to listen?**

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- **How do I adjust the volume for the event?**

Please adjust your volume to the desired setting using the volume settings on your device. You can also adjust the volume in the lower right corner of the webcast. Please ensure the volume button is not muted in the platform.

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Yes, you can maximize your screen by selecting the full-screen icon  located in the lower right corner of your screen.

# Intended Audience

- Health insurance issuers participating in the External Data Gathering Environment (EDGE) server process for the Risk Adjustment (RA) program
- Third Party Administrators (TPAs) and Support Vendors

# Purpose

- This External Data Gathering Environment (EDGE) Server session will:
  - Provide a general overview of the updates to the EDGE Server O&MM Version 2.0, posted in the Registration for Technical Assistance Portal (REGTAP) Library on June 8, 2018.
  - Highlight the documents incorporated into the O&MM, which are scheduled to be retired and marked as “RET OMM” in the REGTAP Library on June 15, 2018.
- This session is a follow-up to the December 5, 2017 webinar on the proposed changes to the O&MM.

# EDGE Server Operations and Maintenance Manual (O&MM) Overview

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# O&MM: Overview

- CMS published the EDGE Server O&MM in the REGTAP Library on June 8, 2018.
  - The O&MM is a compilation of documents containing information pertaining to the functional system design of the EDGE Server.
  - It is located on the DDC Homepage under the EDGE Core Resources section.

- The O&MM streamlines information for issuers by:
  - Consolidating currently published EDGE Server technical documents located in the REGTAP Library
  - Complementing the EDGE Server Interface Control Document (ICD) and the EDGE Server Business Rules (ESBR)
  - Including topics such as registering EDGE Servers, data maintenance procedures, functional system operations, command execution, and troubleshooting

- The O&MM does not contain new processes or policies that were not previously published

# O&MM: Overview (continued)

The EDGE Server O&MM will provide issuers with the following benefits:

- Consolidate relevant technical information in one (1) document for both new and experienced issuers
- Provide more efficient and effective assistance for issuers when researching information, since issuers will no longer have to reference several documents for assistance
- Reduce confusion on whether issuers are using the most current version of a document
- Provide the information necessary to operate and maintain the EDGE server application

# O&MM: Overview (continued)

- On June 15, 2018, CMS will retire 30 documents in the REGTAP Library that were consolidated into the O&MM
- CMS will update the O&MM on a quarterly basis
  - CMS plans to update the ESBR on a complementary schedule
- Some documents, such as the EDGE Server Timeline and temporary notifications, will remain as separate publications

# REGTAP Library Documents

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# Documents Retired

- The documents listed below will be marked as “RET OMM” in the REGTAP Library. The sections below outline where the documents were incorporated into the O&MM.
- Section 2: System Overview
  - AWS EDGE Server Infrastructure
- Section 3: Provisioning & Set Up
  - DDC On-Premise EDGE Server Guidance Webinar Slides
  - Distributed Data Collection for RA and RI Update: EDGE Server Option Overview
  - DDC Amazon EDGE Server Guidance
  - Amazon EDGE Server Set-Up Best Practices Presentation
  - On-Premise EDGE Server AWS IP Address Changes, Impacts, and Solutions
  - Requesting Issuer EDGE Registration Request Approver Role

# Documents Retired (continued)

- Section 3: Provisioning & Set Up *(continued)*
  - EDGE Server Job Aid: On-Premise EDGE Server Setup Version 3.0 - Step 1
  - EDGE Server Amazon and On-Premise Provisioning Process Flow Guide Version 2.0
  - EDGE Server Job Aid: EDGE Server Registration On-Premise Server Step 2 & Amazon Server Step 3
  - EDGE Server Job Aid On-Premise EDGE Server Provisioning Version 4.0- Step 3
  - EDGE Server Job Aid: Amazon EDGE Server Provisioning Version 2.0 - Step 4
  - Amazon EDGE Server Security Presentation
  - EDGE Server Job Aid: AWS Account Set-Up Version 1.0 - Step 1
  - EDGE Server Job Aid: EDGE Installer Policy Document
  - EDGE Server Job Aid: Requesting an AWS EDGE Instance Version 1.0 - Step 2
- Section 4: Operations
  - EDGE Server RA and RI Report and Local Commands Job Aid
  - EDGE Server Job Aid: On-Premise EDGE Server File Processing Version 2.0 - Step 4

# Documents Retired (continued)

- Section 4: Operations *(continued)*
  - EDGE Detail Report Query Procedure Job Aid
  - Outbound Detail Report Query
  - EDGE Server Job Aid: Amazon EDGE Server File Processing Version 2.0 - Step 6
  - EDGE Server Job Aid: AWS File Processing Email Notification Version 1.0 - Step 5

- Section 5: Backup and Maintenance Procedures
  - Backup Policy and User Guide for AWS and On-Premise EDGE Servers
  - EDGE Server Backup Policy Update
  - EDGE Server Disaster Recovery Process Job Aid
  - EDGE Server Database Backup Process for 2014 Data
  - EDGE Server Issuer Confirmation of 2015 Pre-Archive Steps
  - EDGE Server Annual Archive Job Aid
  - EDGE Server Truncation Requests
  - EDGE Server Truncation Request Web Form Guide

# Questions?

To submit questions:

- Type your question in the text box under the “Q&A” tab located in the lower left side of your screen
  - To submit the question, click “Submit”



If you did not receive a response to your question during this webinar session, please submit your question to the FMCC team at: EDGE_Server_Data@cms.hhs.gov

# Upcoming Webinar

| Webinar | Scheduled Event Date |
| --- | --- |
| **Business Rules Updates** | **June 26, 2018** |

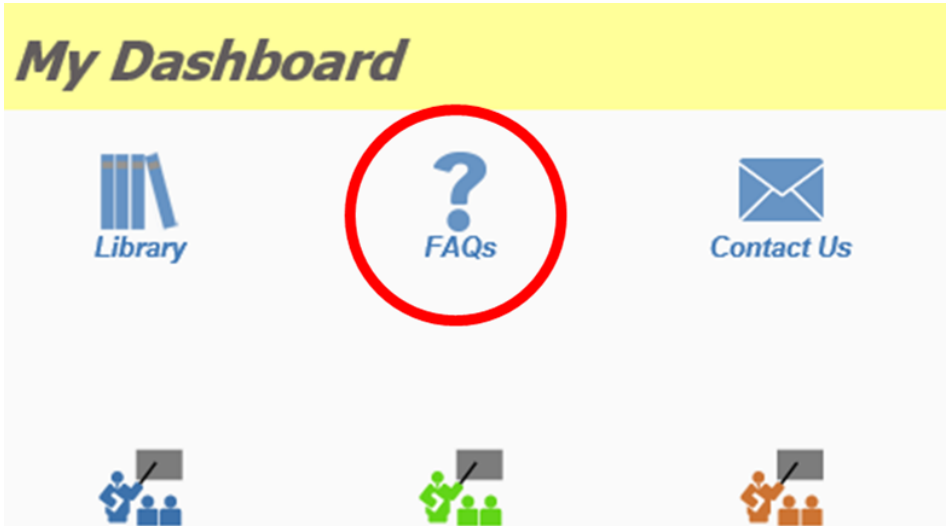
# Resources

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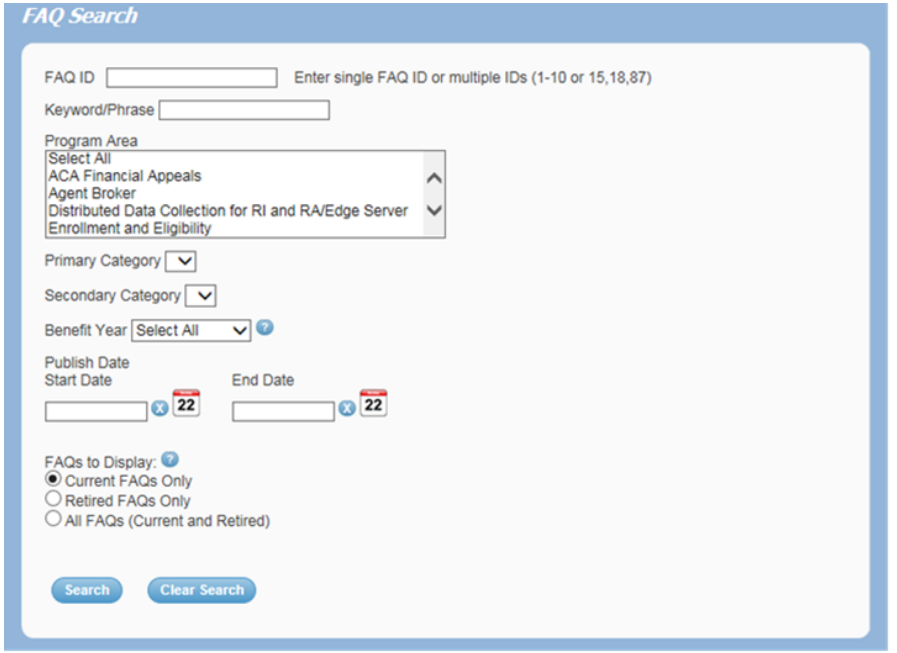
# Resources

| Resource | Link/Contact Information |
| --- | --- |
| Center for Consumer Information and Insurance Oversight (CCIIO) | http://cms.gov/cciio/ |
| Registration for Technical Assistance Portal (REGTAP)<br>• Registration<br>• Resource Library<br>• Frequently Asked Questions (FAQs) | https://www.REGTAP.info/ |

# FAQ Database on REGTAP




The FAQ Database allows users to search FAQs by FAQ ID, Keyword/Phrase, Program Area, Primary and Secondary categories, Benefit Year and Publish Date.



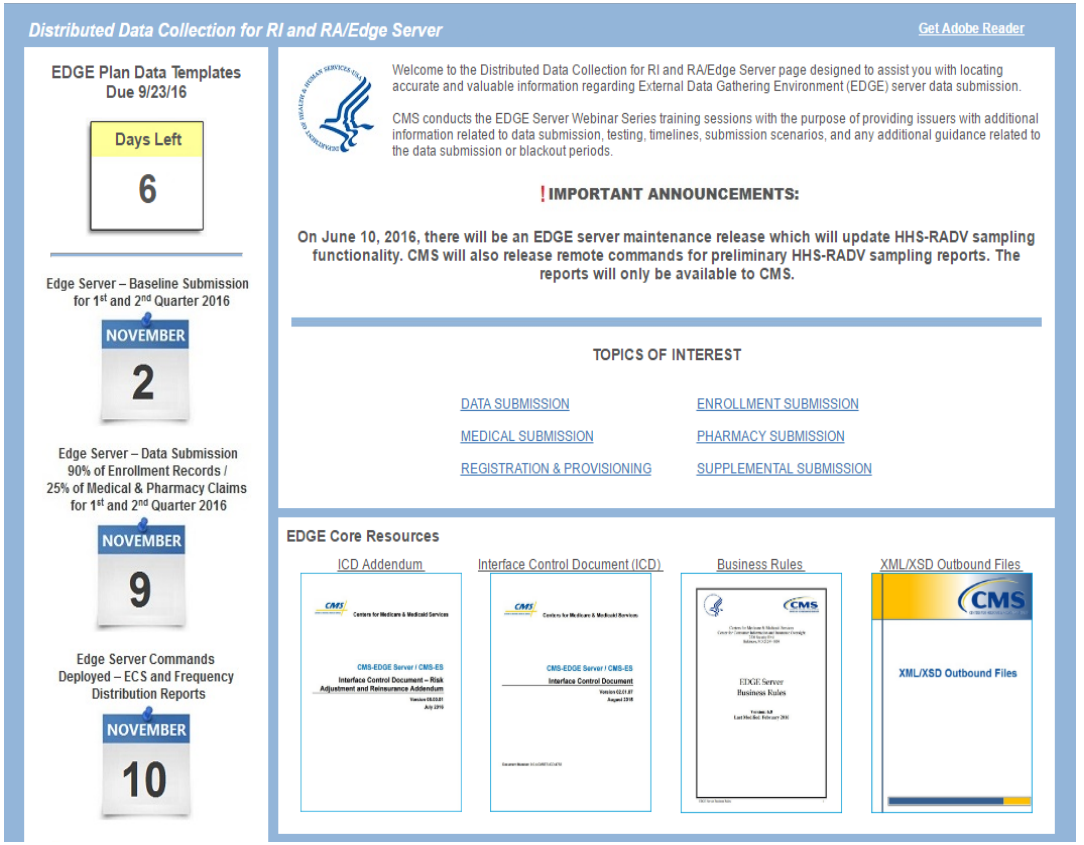

FAQ Database is available at https://www.regtap.info/.

# DDC/EDGE Server Resource Page

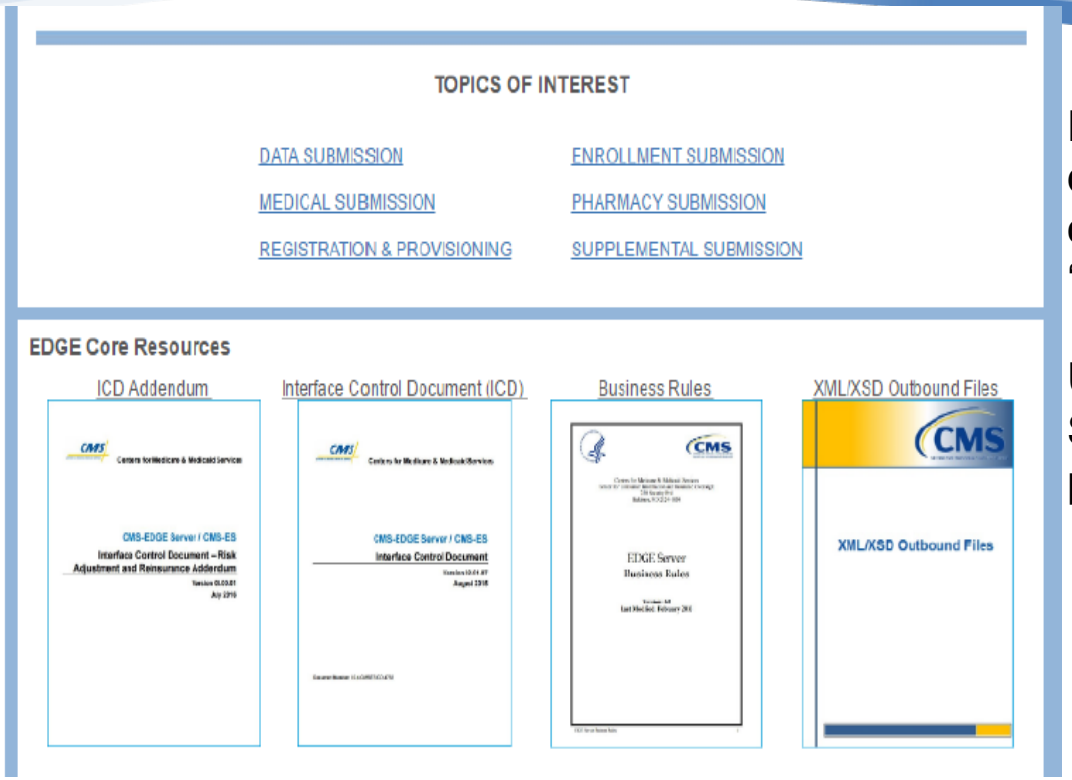
The DDC/EDGE Server Resource Page provides central access to job aids, announcements, documentation, FAQs, deadlines and other resources.

To access the DDC/EDGE Server Resource Page, click on the Program Area Pages icon on 'My Dashboard' or access the page at https://www.REGTAP.info/ddc.php.



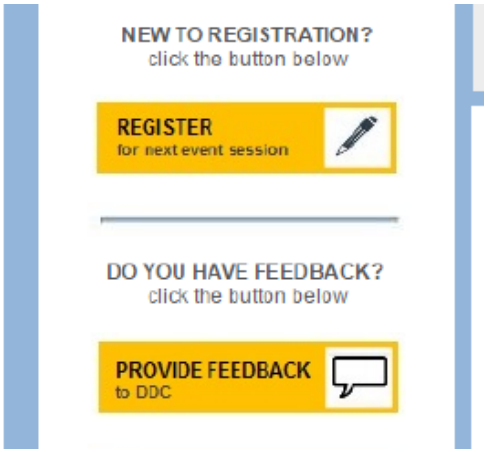



# DDC/EDGE Server Resource Page
## (continued)




For quick access to related documentation, users can find resources organized by Topics of Interest, such as 'Medical Submission' or 'Registration'.

Users can also register for active EDGE Server training series, contact CMS, provide feedback and more.




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# Closing Remarks