

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

October 30, 2018

EDGE Server Webinar Series VIII



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[HTTPS://WWW.REGTAP.INFO](https://www.regtap.info)

Session Agenda

- Purpose
- Session Guidelines
- Intended Audience
- External Data Gathering Environment (EDGE) Server O&MM Overview
- Question and Answer (Q&A)
- Resources
- Closing Remarks

Session Guidelines

- This is a 60-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.

Intended Audience

- Health Insurance Issuers
- Third Party Administrators (TPAs)

Purpose

- This EDGE Server session will:
 - Provide a general overview of the updates to the EDGE Server O&MM Version 3.0, posted in the Registration for Technical Assistance Portal (REGTAP) Library on October 29, 2018.
 - Highlight the documents incorporated into the O&MM, which are scheduled to be retired and marked as “RET OMM” in the REGTAP Library, and on the REGTAP DDC Retired Resource page, on November 2, 2018.

EDGE Server O&MM Overview

O&MM Overview

- The Centers for Medicare and Medicaid Services (CMS) published the O&MM Version 3.0 in the REGTAP Library on October 29, 2018.
- It is located on the DDC Homepage under the EDGE Core Resources section.
- The O&MM streamlines information for issuers by:
 - Consolidating documents containing information pertaining to the functional system design of the EDGE server
 - 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

O&MM Overview (continued)

- CMS updates the O&MM on a quarterly basis.
 - The ESBR is updated on a complementary schedule.
- It includes updated information based on issuer inquiries and information previously shared during the EDGE Server Webinar presentations.
- The O&MM does not contain new processes or policies that were not previously published.

O&MM: Updates to Section 1.

Introduction

Topic	Key Points	Location in O&MM
High Cost Risk Pool (HCRP)	Added overview of HCRP program and listed the HCRP Reference Guide as a key document in Table 1-2. The guide provides issuers with an overview of the HCRP calculations and associated EDGE reporting for Benefit Year (BY) 2018.	Section 1.2; Table 1-2

O&MM: Updates to Section 3. Provisioning & Set Up

Topic	Key Points	Location in O&MM
On-Premise Server Registration	Consolidated the EDGE Server Management Console Server Status Tracking section by deleting repeated steps for tracking the status of requests. Issuers are reminded to email CMS_FEPS@hhs.gov to inform CMS when a server request has been added.	Section 3.4.2

O&MM: Updates to Section 3.

Provisioning & Set Up (continued)

Topic	Key Points	Location in O&MM
Migration Requests	Clarified that issuers must create a migration ticket and receive CMS approval prior to initiating any migration. Financial Management Coordination Center (FMCC) representatives will inform issuers once the server migration is approved by CMS. Migrating before CMS approval can have detrimental effects on remote commands or the data archival process.	Section 3.6
Migration Process Timing	Clarified that Issuers should consider that a typical server migration can take several weeks, especially when ending a contract with a TPA. Old server data can be backed up while the new server software is being installed to help expedite the migration process.	Section 3.6

O&MM: Updates to Section 4. Operations

Topic	Key Points	Location in O&MM
Troubleshooting Help for Pharmacy Claims (RXC) Rejected as Duplicates	Added two (2) queries that issuers can use to identify the existing claim that caused the inbound RXC to be rejected due to the duplicate logic. The Dispensing Status for a new claim depends on the status of the active stored claim. Additional information on duplicate RXCs is located in Section 6.5 of the ESR.	Section 4.1.8

O&MM: Updates to Section 4. Operations (continued)

Topic	Key Points	Location in O&MM
EDGE Local Commands	Added the following three (3) commands for HCRP and a description of their results. • edge report HCRP_NATIONAL_PRELIM YYYY test • edge report HCRP_NATIONAL_PRELIM YYYY prod • edge report HCRP_NATIONAL_PRELIM YYYY validation	Section 4.2.1 Table 4-1
CMS Remote Commands	Added the following two (2) commands for HCRP and a description of their results • HCRP_NATIONAL_PRELIM • HCRP_NATIONAL_FINAL	Section 4.2.2 Table 4-2

O&MM: Updates to Section 5. Backup and Maintenance Procedures

Topic	Key Points	Location in O&MM
Annual Archive	Incorporated updates from the EDGE Server Annual Archive Job Aid published on 7/17/18. Beginning in July 2018: • Issuers will need to confirm the count of records for BY2018 which are expected to be restored as part of the archive command. • Data archived for the new benefit year will be restored to the production tables eliminating the need for issuers to re-submit new BY data submitted prior to the archive.	Section 5.3

O&MM: Updates to Section 5. Backup and Maintenance Procedures (continued)

Topic	Key Points	Location in O&MM
Truncation Requests	Incorporated updates from the Truncation Request Web Form Guide published on 8/30/18. CMS streamlined the web form submission process such that: • Issuers no longer provide details regarding the type of data effected when selecting test and validation zones • Issuers no longer need to identify a date range for truncation requests (defaults to seven [7] days)	Section 5.4

O&MM: Updates Section 6. Reference Data

Topic	Key Points	Location in O&MM
Global Reference Data Tables	Added that CMS updates the Global Reference Data Tables monthly to ensure that issuers have the latest reference data. Within five (5) business days of each update, CMS will publish monthly Global Reference Data Files that provide summary and detailed information for each update. The files will be posted to REGTAP on the DDC Program Page.	Section 6.1

O&MM: Updates Section 6.

Reference Data (continued)

Topic	Key Points	Location in O&MM
Plan Data Source & Integration	Clarified that when reusing a Plan ID from one (1) BY to the next, the metal level, market type and product type must be the same to ensure the integrity of the RA program and adherence to uniform modification requirements established in 45 CFR 147.106 and in 45 CFR 144.103 (definition of “plan”).	Section 6.2
Plan Data Small Group Rollover	Added a new section on Plan Data Small Group Rollover. Beginning with BY2018, CMS will rollover certified small group plans offered in the previous BY that are no longer offered for new enrollment in the current BY. CMS will not roll over plans that were rolled over in the previous year and will not rollover any inactive plans.	Section 6.5

REGTAP Library Documents

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 5.3 Archive Process
 - EDGE Server Annual Archive Job Aid (7/17/18)
- Section 5.4 Truncation Requests
 - EDGE Server Truncation Request Web Form Guide (8/30/18)
 - EDGE Server Truncation Requests – Presentation Slides (8/29/18)

Questions?

To submit or withdraw questions by phone:

- *Dial *# (star-pound) on your phone's keypad to ask a question.*
 - *Dial *# (star-pound) on your phone's keypad to withdraw your question.*

Upcoming Webinar

Webinar	Scheduled Event Date
To Be Determined	November 6, 2018

Resources

Resources

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

FAQ Database on REGTAP

My Dashboard



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

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 Search

FAQ ID Enter single FAQ ID or multiple IDs (1-10 or 15,18,87)

Keyword/Phrase

Program Area

Select All
ACA Financial Appeals
Agent Broker
Distributed Data Collection for RI and RA/Edge Server
Enrollment and Eligibility

Primary Category

Secondary Category

Benefit Year

Publish Date

Start Date

22

End Date

22

FAQs to Display:

- ☒ Current FAQs Only
☐ Retired FAQs Only
☐ All FAQs (Current and Retired)

Search

Clear Search

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>.



Distributed Data Collection (DDC) for RI and RA/EDGE Server

[Get Adobe Reader](#)

Welcome to the Distributed Data Collection for RI and RA/Edge Server page designed to assist you with locating accurate and valuable information regarding External Data Gathering Environment (EDGE) server data submission.

CMS conducts the EDGE Server Webinar Series training sessions with the purpose of providing issuers with additional information related to data submission, testing, timelines, submission scenarios, and any additional guidance related to the data submission or blackout periods.

Please visit [CCIIO's Regulation and Guidance Page](#) for further guidance.

TOPICS OF INTEREST

REFERENCE TABLE UPDATES	BASELINE SUBMISSION
DATA SUBMISSION	ENROLLMENT SUBMISSION
MEDICAL SUBMISSION	PHARMACY SUBMISSION
SUPPLEMENTAL SUBMISSION	

EDGE Core Resources

EDGE Server Operations & Maintenance Manual (O&MM) V 2.0	EDGE Server Updates 2017 Data Submission, Issue 2	EDGE Server Business Rules (ESBR) V 10.0	Interface Control Document (ICD) V 02.01.15
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[View More](#)

Baseline Q1, Q2, and Q3 Data Submission Window Opens

November 6 - November 20

Days Left

25

EDGE 29.0 Released to Validation Zone

NOVEMBER

16

EDGE SERVER TIMELINE

click image to enlarge

DDC/EDGE Server Resource Page

(continued)

TOPICS OF INTEREST

[REFERENCE TABLE UPDATES](#)

[BASELINE SUBMISSION](#)

[DATA SUBMISSION](#)

[ENROLLMENT SUBMISSION](#)

[MEDICAL SUBMISSION](#)

[PHARMACY SUBMISSION](#)

[SUPPLEMENTAL SUBMISSION](#)

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

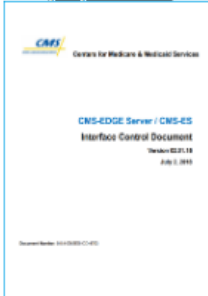
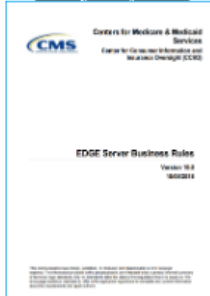
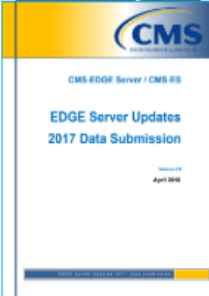
EDGE Core Resources

[EDGE Server Operations & Maintenance Manual \(O&MM\) V 2.0](#)

[EDGE Server Updates 2017 Data Submission, Issue 2](#)

[EDGE Server Business Rules \(ESBR\) V 10.0](#)

[Interface Control Document \(ICD\) V 02.01.15](#)



[View More](#)

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

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click the button below

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for next event session



DO YOU HAVE FEEDBACK?
click the button below

PROVIDE FEEDBACK
to DDC



Closing Remarks