

Centers for Medicare & Medicaid Services

EDGE Server Truncation Request

Web Form Guide

August 2018

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Resources

The following 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
- EDGE Server Truncation Request webinar training materials from the REGTAP library in the Distributed Data Collection for 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 their 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.

Database truncation is a process by which issuers can delete claim, supplemental diagnosis, and enrollment data that has been submitted to the EDGE server in the Production, Test, or Validation Zones. The truncation command will delete all data from all schema data tables based on the zone indicated. There is no option to delete or truncate a single table or a subset of data in any zone. CMS reviews truncation/truncation extension requests, then provides notification and instructions to issuers.

Note: If you have previously received a truncation script for a specific HIOS ID for the Test or Validation Zone, you do not need to request a new truncation script for that HIOS ID in that zone. Test and Validation Zone truncation scripts do not expire and can be reused as often as needed.

The EDGE Server Truncation Request web form link will be emailed to company 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.

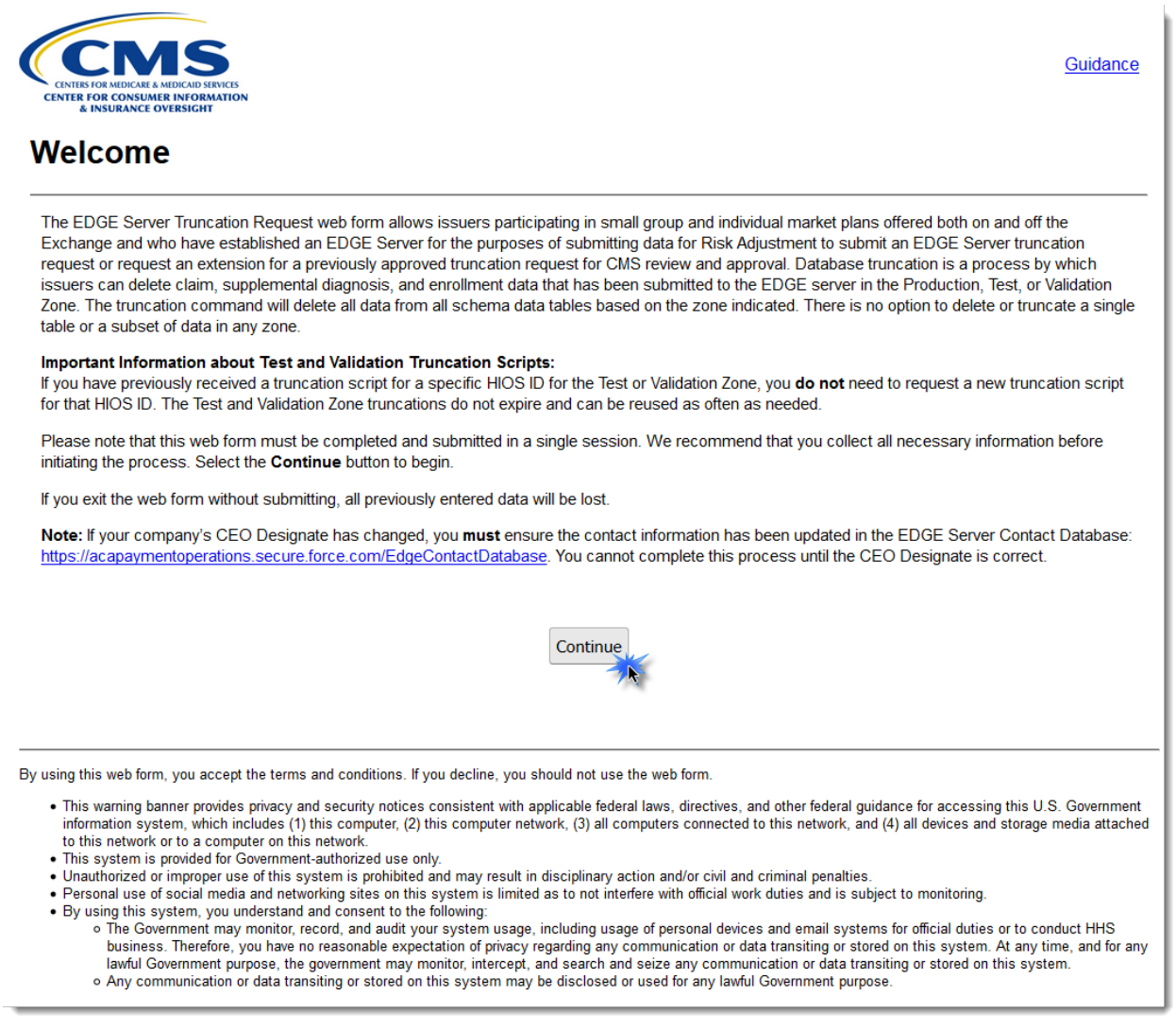
This document is a step-by-step guide to complete and submit the EDGE Server Truncation Request web form.

Note: The web form is optimized for use with Google Chrome™ or Firefox®. Some form features, such as error messaging, may not function properly in Internet Explorer®.

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 navigate to the **Contact Information** page.

Figure 1: Welcome Page

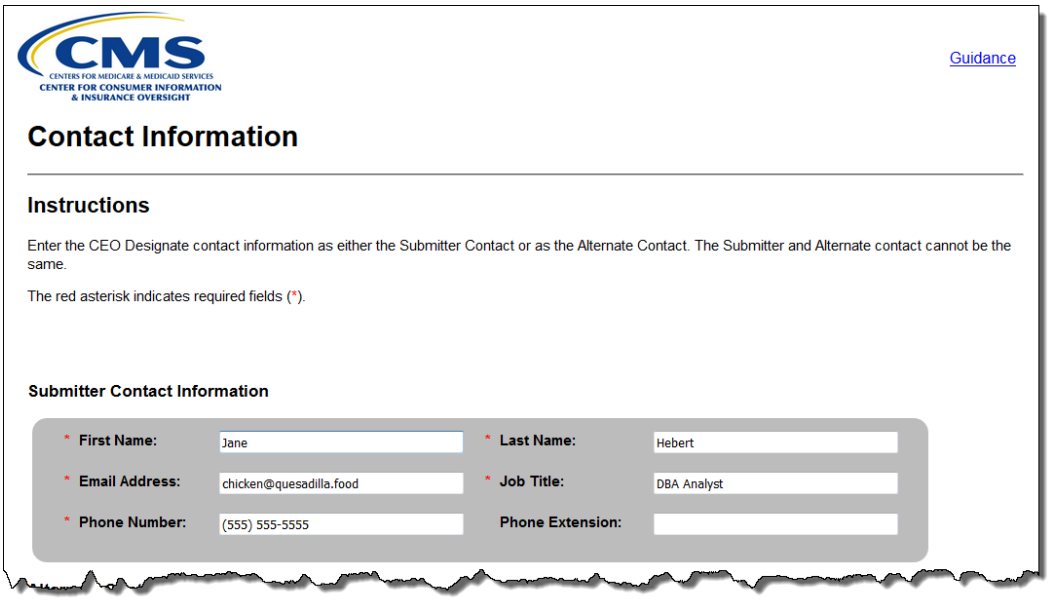


3 Contact Information Page

The **Contact Information** page collects Submitter and Alternate Contact information. You must enter the CEO Designate contact information for either the Submitter or the Alternate Contact. The Submitter and Alternate Contact cannot be the same. Follow these steps to complete the **Contact Information** page:

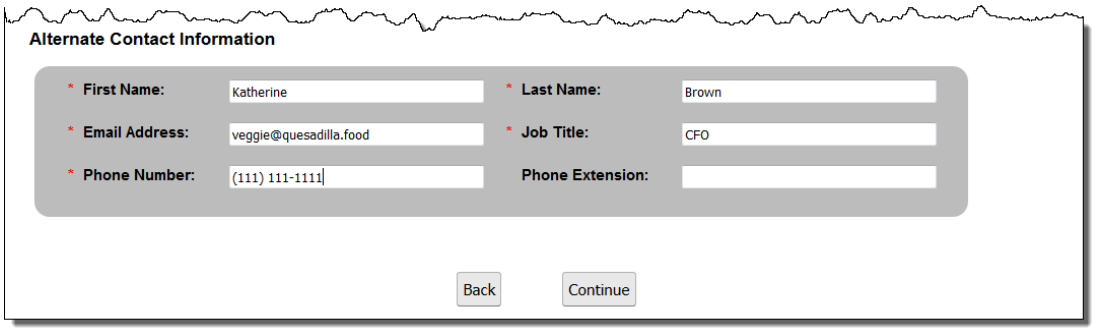
1. Enter the Submitter contact information:
   - First Name
   - Last Name
   - Email Address
   - Job Title
   - Phone Number
   - Phone Extension (optional)

Figure 2: Submitter Contact Information



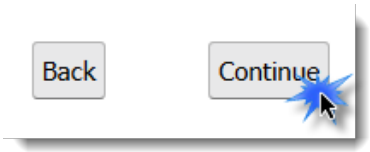
2. Enter the Alternate Contact information (must be different from the Submitter):
   - First Name
   - Last Name
   - Email Address
   - Job Title
   - Phone Number
   - Phone Extension (optional)

Figure 3: Alternate Contact Information



3. Select the **Continue** button. You will be directed to the **EDGE Server Truncation Request Type** page of the form.

Figure 4: Continue Button



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 to request an extension for a previously approved truncation request, as shown in Figure 5.

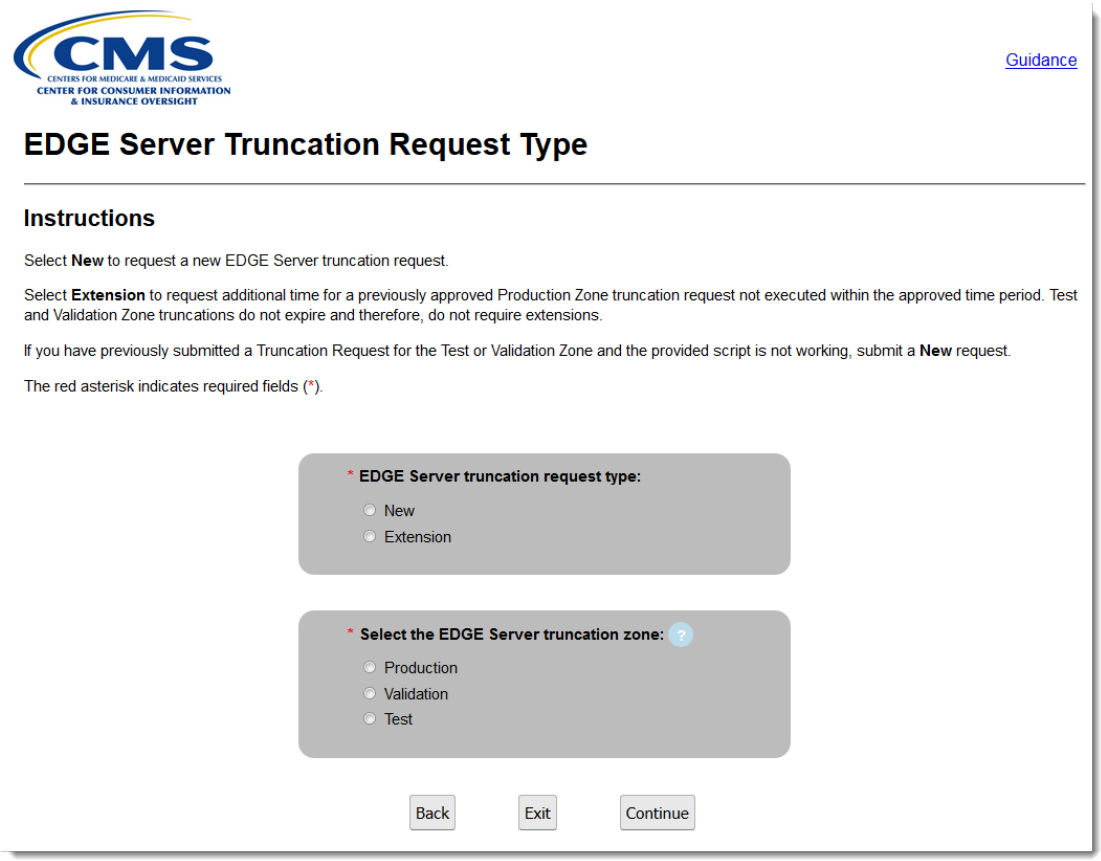
Note: The Test and Validation Zone options will be disabled if you choose an extension request as extensions are not applicable for the Test or Validation Zone.

Table 1: EDGE Server Truncation Request Type

If	Then
You need to make a new truncation request,	Refer to Section 5.
You need to extend a previously approved truncation request,	Refer to Section 6.

Note: 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 5: EDGE Server Truncation Request Type Page

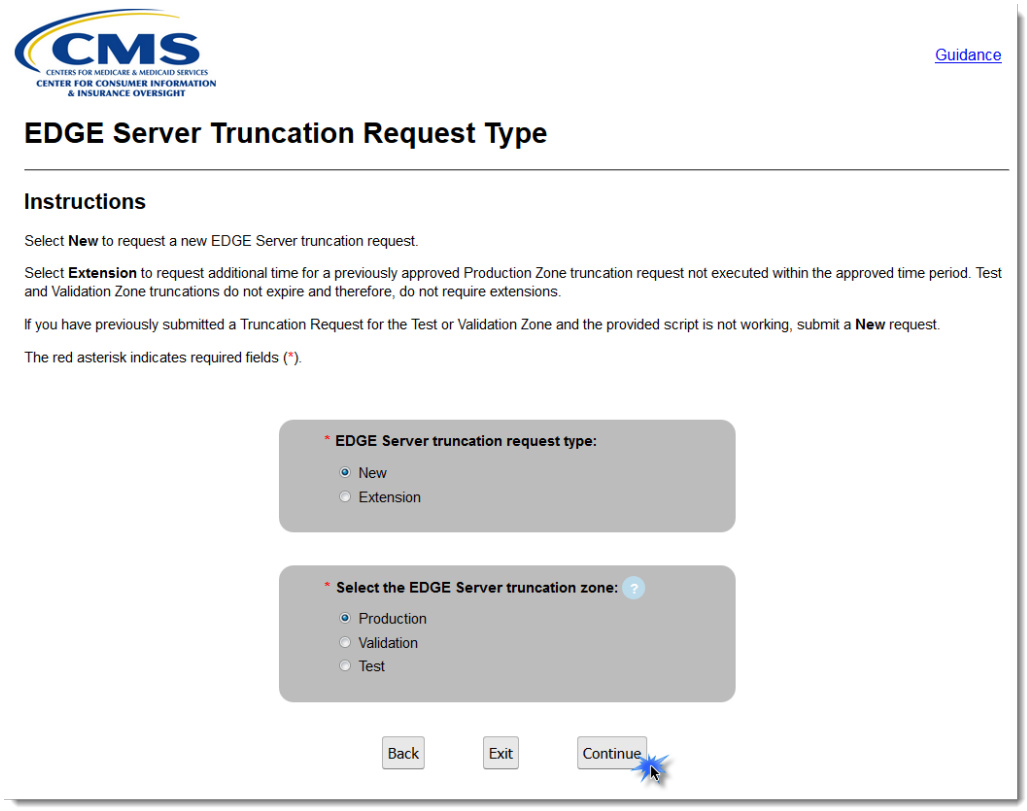


5 New EDGE Server Truncation Request

This section provides instructions on how to make a new request for EDGE server truncation. Refer to Figure 6.

1. Select the New radio button to request a new EDGE server truncation request.
2. Select the radio button for the zone you wish to truncate.
3. Select the **Continue** button. You will be directed to the **New EDGE Server Production Zone Truncation Request** page or the **New EDGE Server Test/Validation Zone Truncation Request** page, depending on your selection.

Figure 6: New EDGE Server Truncation Request Radio Button

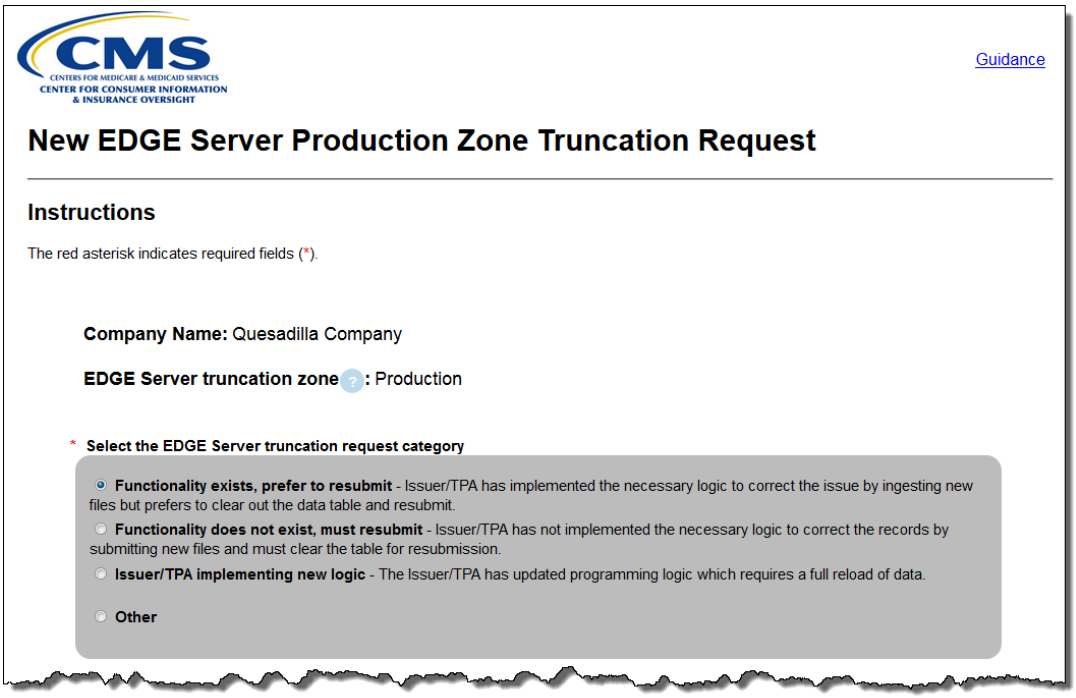


5.1 New EDGE Server Production Zone Truncation Request Page

The **New EDGE Server Production Zone Truncation Request** page requires entry of information related to the type of and reasoning behind your Production Zone truncation request. Follow these steps to complete the **New EDGE Server Production Zone Truncation Request** page:

1. Select the appropriate radio button from the ***Select the EDGE Server truncation request category***:
   - ***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.
   - ***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.
   - ***Issuer/TPA implementing new logic*** - The Issuer/TPA has updated programming logic, which requires a full reload of data.
   - ***Other***

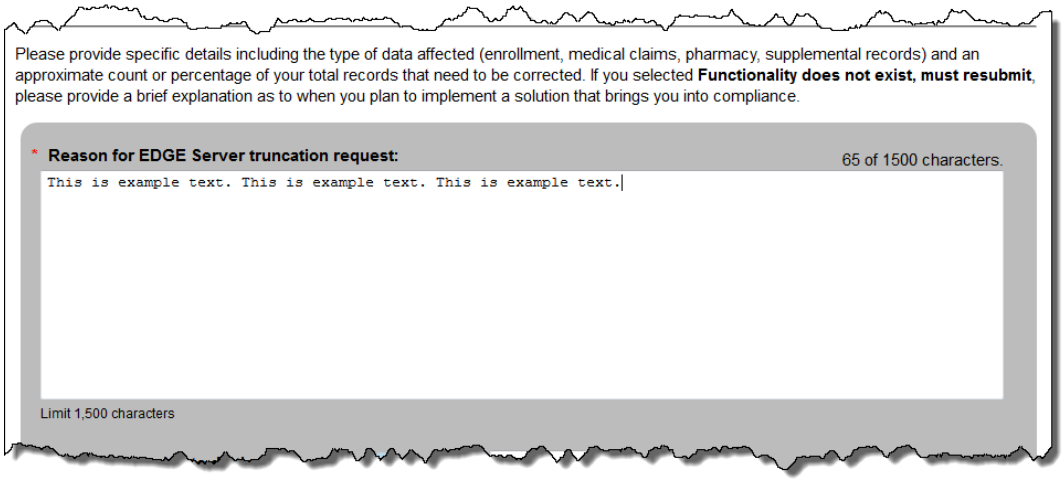
Figure 7: Truncation Request Category Selection



2. Enter the reason for your truncation request, including 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.

Note: Provide a brief explanation as to when you plan to implement a solution that brings you into compliance if you selected the *Functionality does not exist, must resubmit* radio button (see Step 1).

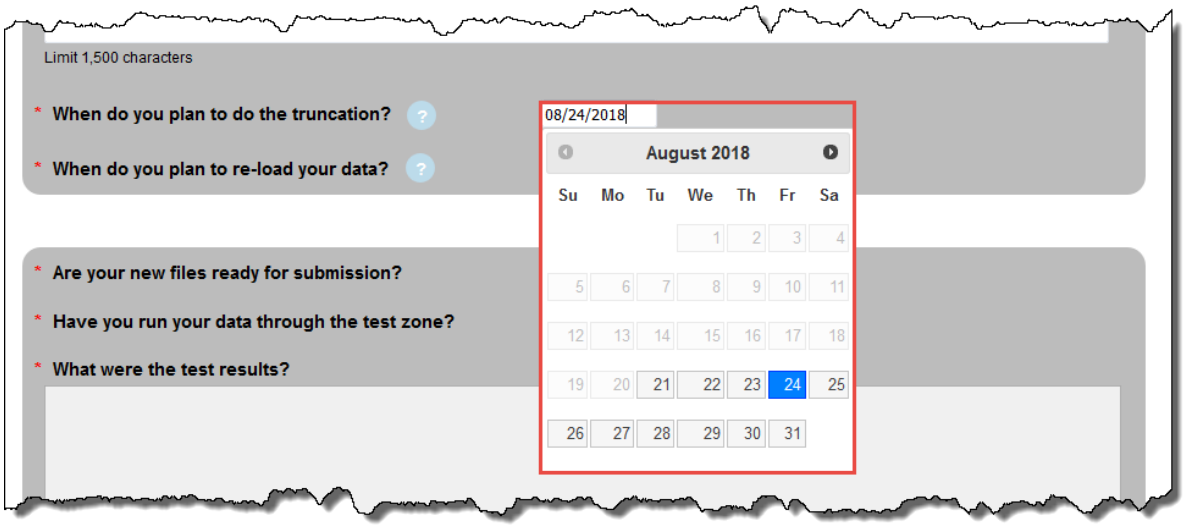
Figure 8: Truncation Request Reason



3. Enter the planned truncation date in the ***When do you plan to do the truncation?*** field.

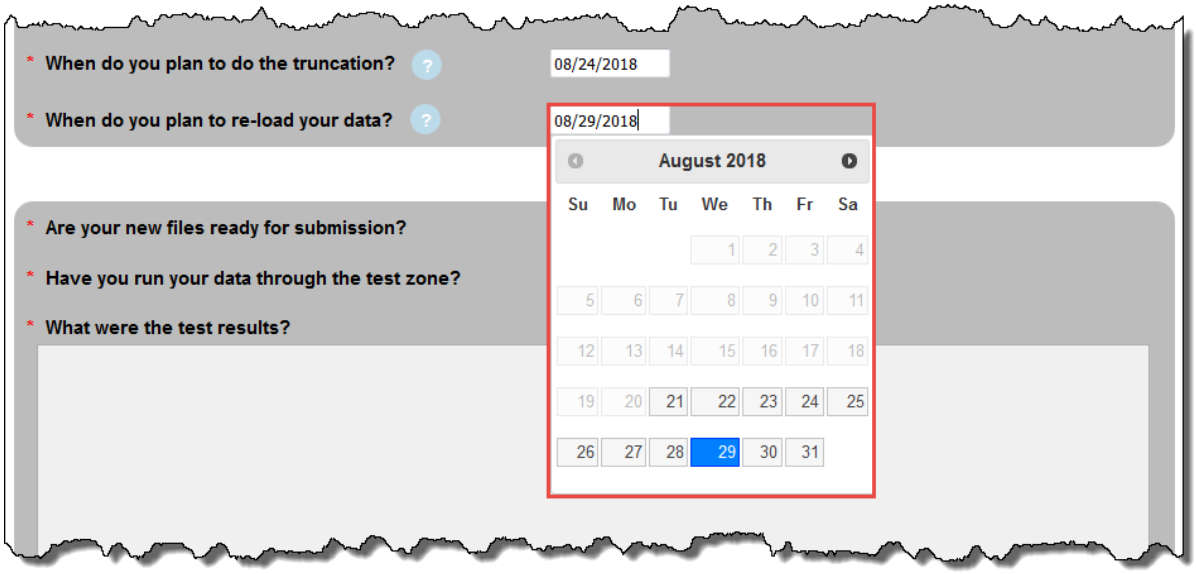
> **Note: This date must be at least one business day from today's date.**

Figure 9: Planned Truncation Date



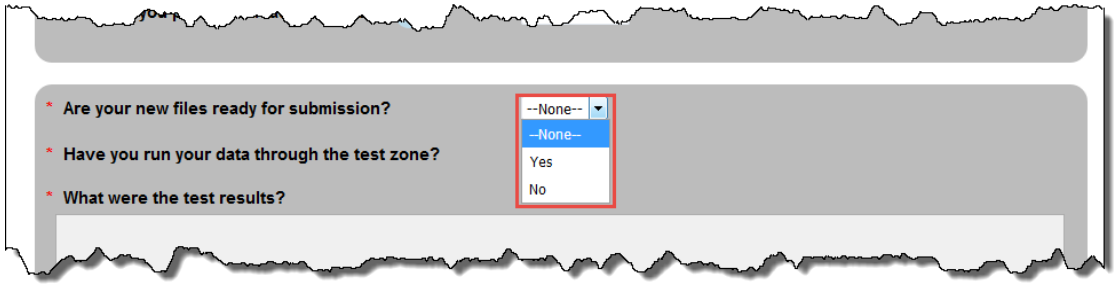
4. Enter your planned re-load date in the ***When do you plan to re-load your data?*** field. This date must be greater than or equal to the planned truncation date, and must also be no more than seven days after the planned truncation date.

Figure 10: Planned Re-load Date Selection



5. Select Yes or No from the ***Are your new files ready for submission?*** drop-down list.

Figure 11: Files Ready for Submission Selection

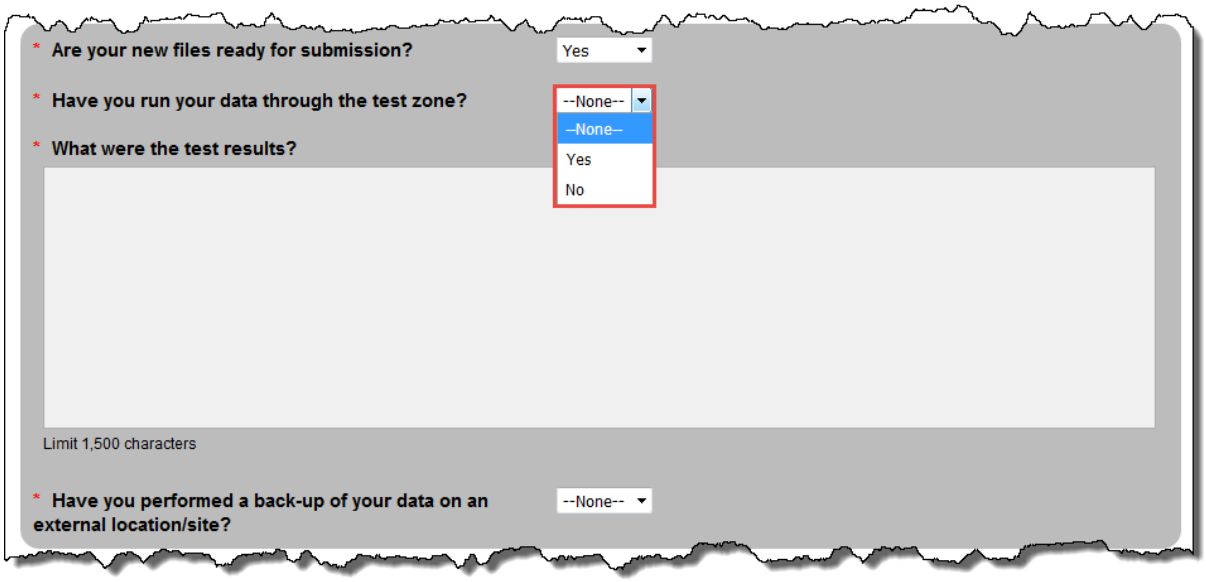


6. Select Yes or No from the ***Have you run your data through the test zone?*** drop-down list.

Table 2: Test Results Selection

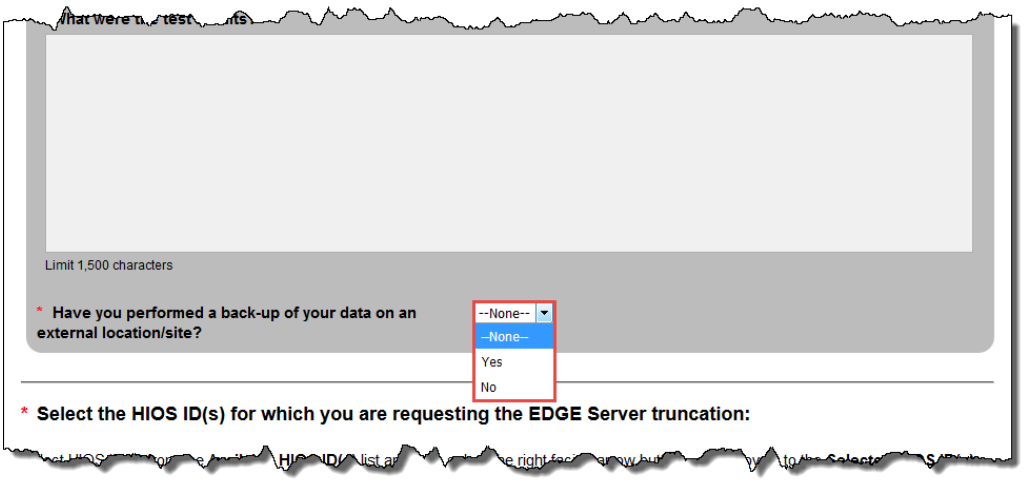
If	Then
Yes	The ***What were the test results?*** field is required. Enter your test results here. This field has a limit of 1,500 characters.
No	Continue to Step 7.

Figure 12: Data Test Selection



7. Select Yes or No from the ***Have you performed a back-up of your data on an external location/site?*** drop-down list.

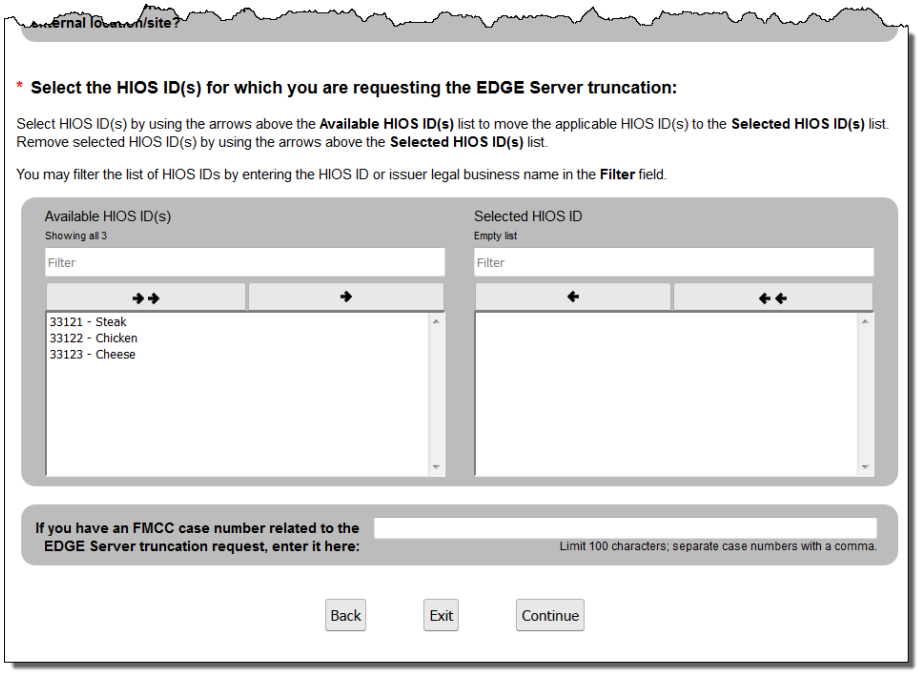
Figure 13: Data Back-up Selection



8. Select the HIOS ID(s) you wish to request the EDGE server truncation from the Available HIOS ID(s) list. Use the arrows above the Available HIOS ID(s) list to move the applicable HIOS ID(s) to the Selected HIOS ID(s) list. Remove selected HIOS ID(s) by using the arrows above the Selected HIOS ID(s) list.

   You may filter the list of HIOS IDs by entering the HIOS ID or issuer legal business name in the Filter field.

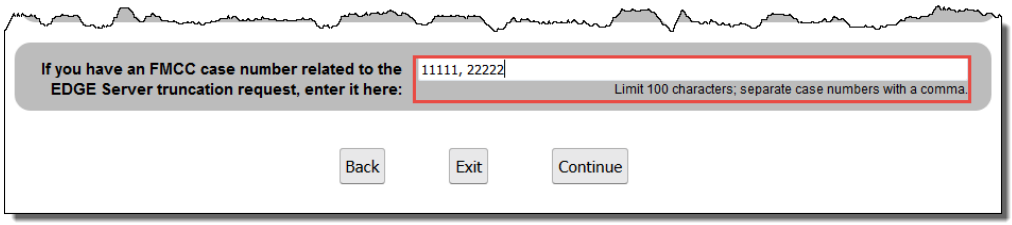
Figure 14: HIOS ID Selection



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.

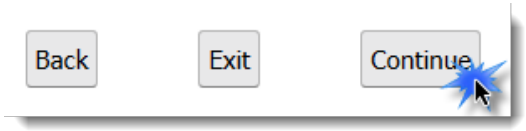
> **Note: This field is optional and has a limit of 100 characters.**

Figure 15: FMCC Number Input



10. Select the **Continue** button. You will be directed to the **Summary** page of the form.

Figure 16: Continue Button

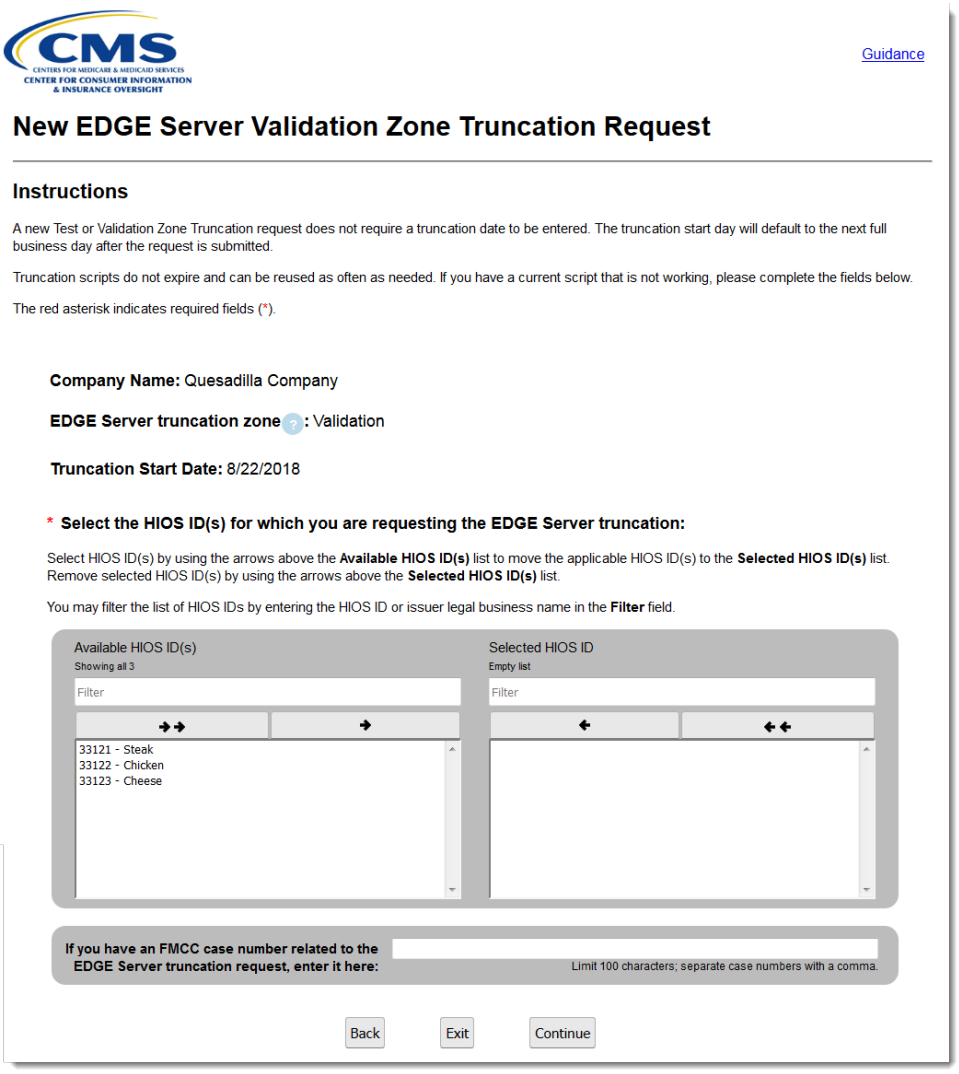


5.2 New EDGE Server Test/Validation Zone Truncation Request Page

The **New EDGE Server Test/Validation Zone Truncation Request** page does not require entry of information related to the type of and reasoning behind your Test or Validation Zone truncation request. A new Test or Validation Zone Truncation request does not require a truncation date to be entered. The truncation start day will default to the next full business day after the request is submitted. Truncation scripts do not expire and can be reused as often as needed. If you have a current script that is not working, initiate a new Test/Validation Zone truncation request.

> **Note: The Company Name, EDGE Server truncation zone, and Truncation Start Date are pre-populated.**

Figure 17: New EDGE Server Validation Zone Truncation Request Page

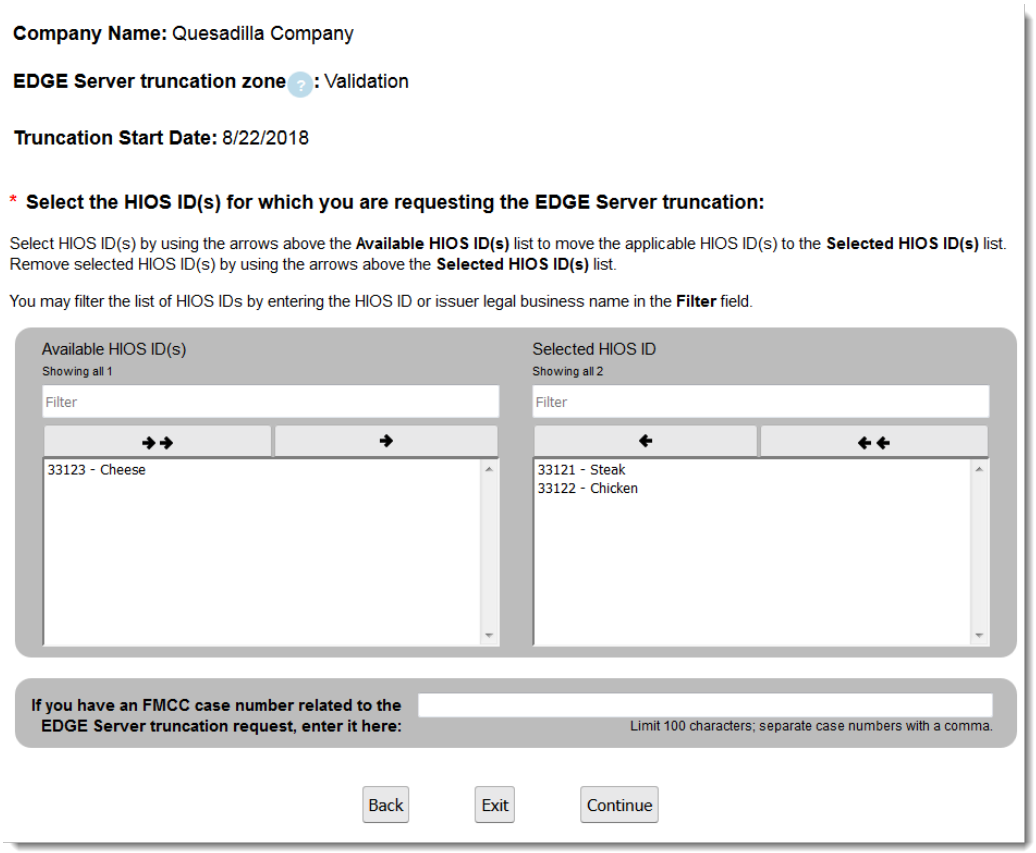


Follow these steps to complete the **New EDGE Server Test/Validation Zone Truncation Request** page:

1. Select the HIOS ID(s) you wish to request the EDGE server truncation from the Available HIOS ID(s) list. Use the arrows above the Available HIOS ID(s) list to move the applicable HIOS ID(s) to the Selected HIOS ID(s) list. Remove selected HIOS ID(s) by using the arrows above the Selected HIOS ID(s) list.

   You may filter the list of HIOS IDs by entering the HIOS ID or issuer legal business name in the Filter field.

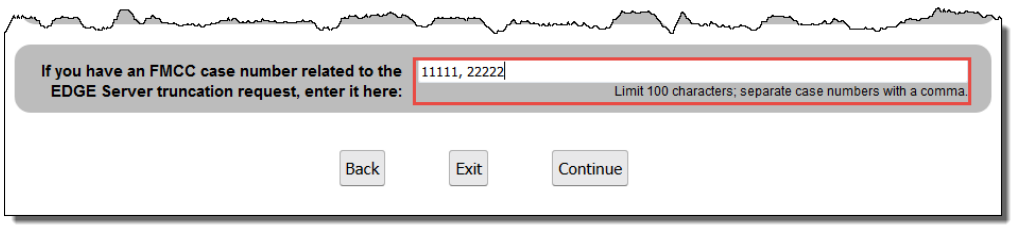
Figure 18: HIOS ID Selection



2. 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.

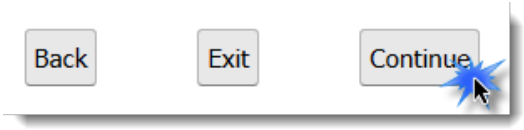
Note: This field is optional and has a limit of 100 characters.

Figure 19: FMCC Number Input



3. Select the **Continue** button. You will be directed to the **Summary** page of the form.

Figure 20: Continue Button

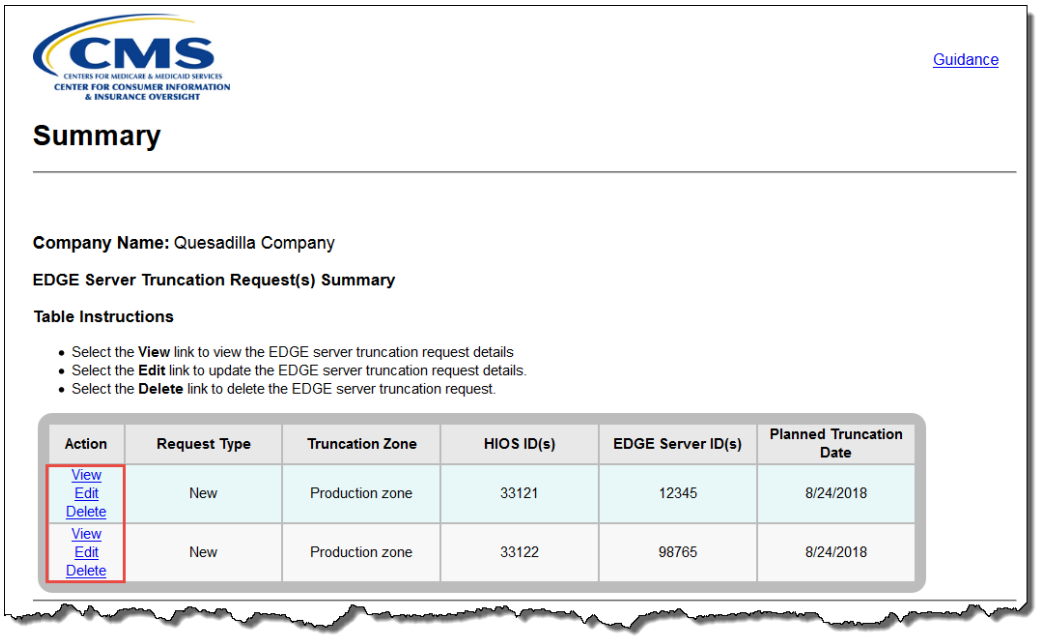


5.3 Summary Page

The **Summary** page allows you to view and edit EDGE server truncation request details and contact information. Follow these steps to complete the **Summary** page:

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.
   - Select the View link to view the EDGE server truncation request details
   - Select the Edit link to update the EDGE server truncation request details
   - Select the Delete link to delete the EDGE server truncation request

Figure 21: EDGE Server Truncation Request(s) Summary Table



CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES
CENTER FOR CONSUMER INFORMATION & INSURANCE OVERSIGHT

Guidance

Summary

Company Name: Quesadilla Company

EDGE Server Truncation Request(s) Summary

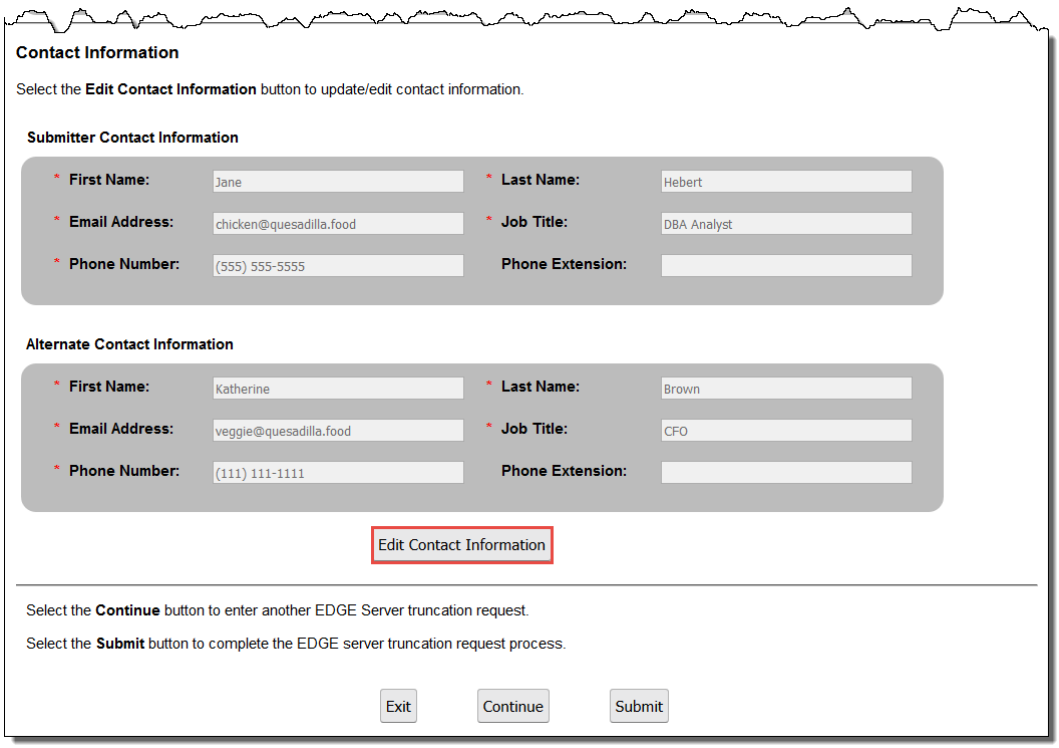
Table Instructions

- Select the **View** link to view the EDGE server truncation request details
- Select the **Edit** link to update the EDGE server truncation request details.
- Select the **Delete** link to delete the EDGE server truncation request.

Action	Request Type	Truncation Zone	HIOS ID(s)	EDGE Server ID(s)	Planned Truncation Date
View Edit Delete	New	Production zone	33121	12345	8/24/2018
View Edit Delete	New	Production zone	33122	98765	8/24/2018

2. Review the Contact information summary. If needed, select the **Edit Contact Information** button to update the information.

Figure 22: Contact Information Summary



3. Select the appropriate button to navigate to the appropriate page.

Table 3: Summary Page

If	Then
You need to enter another truncation request,	Select the **Continue** button to enter another EDGE server truncation request. The form will navigate to the **EDGE Server Truncation Request Type** page (refer to 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 navigate to the **Confirmation** page (continue to Section 5.4).

5.4 Confirmation Page

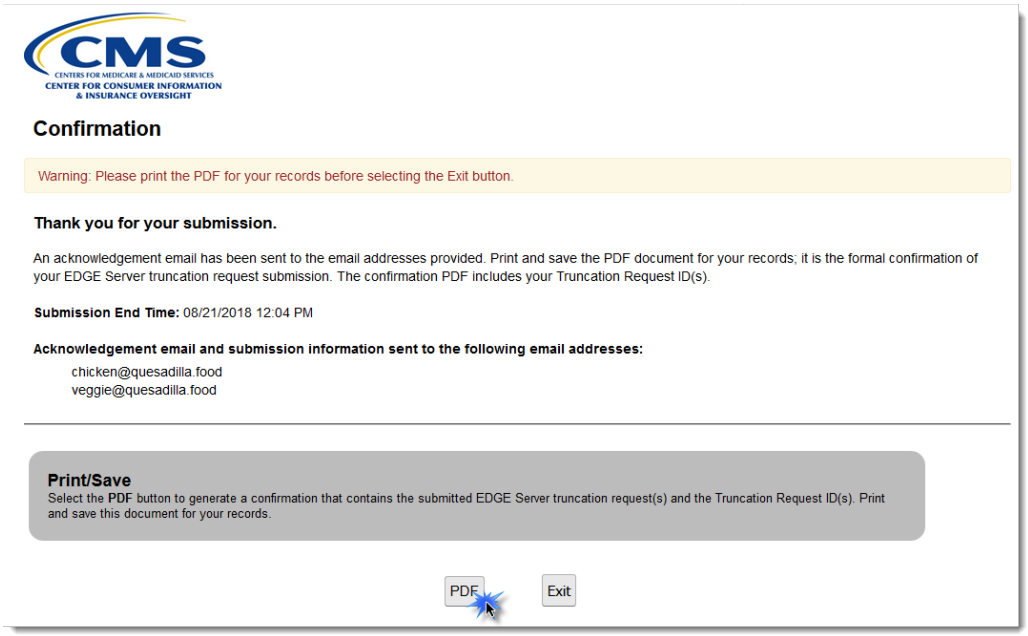
After selecting the **Submit** button on the **Summary** page, an acknowledgement email will be sent to the email addresses provided. The PDF is the formal confirmation of your EDGE server truncation request submission. It is recommended that you save and print a PDF of the

confirmation for your records. The PDF generated on the **Confirmation** page will not be attached to the acknowledgment email.

Follow these steps to complete the **Confirmation** page:

1. Select the **PDF** button to print/save the confirmation for your records.

Figure 23: Confirmation Page



2. Once your confirmation has been printed and/or saved, select the **Exit** button to exit the web form.

Figure 24: Exit Button



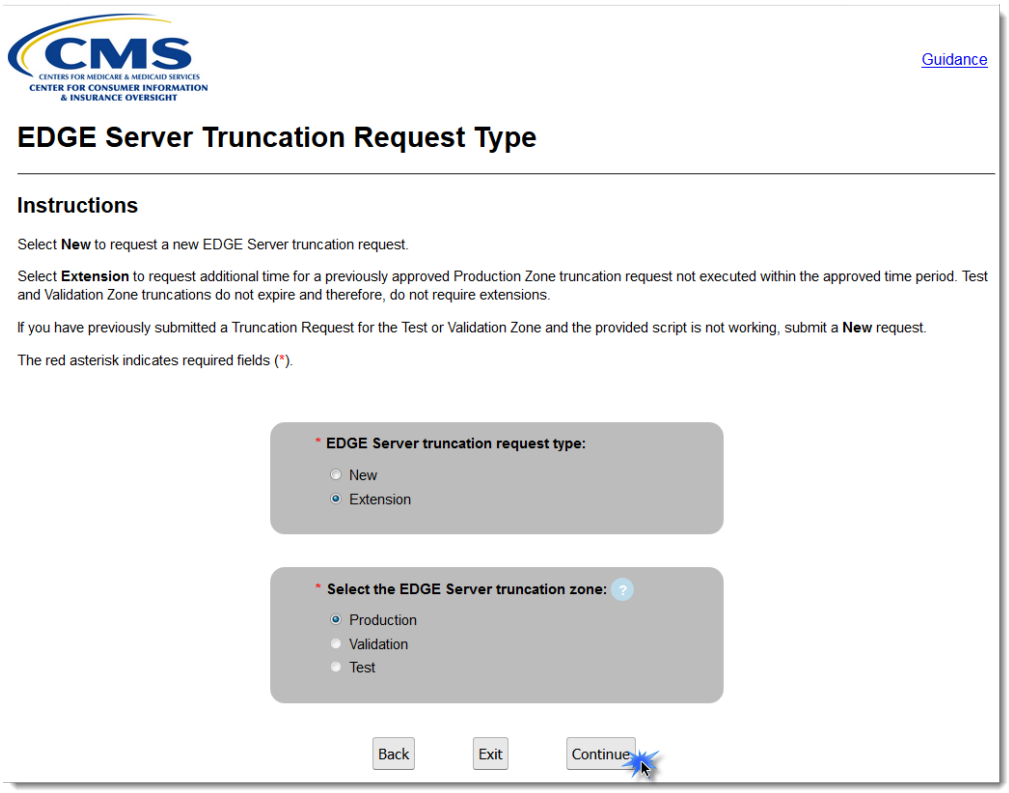
6 EDGE Server Truncation Extension Request

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

Select the Extension radio button to request an extension on an existing EDGE server truncation request and select the **Continue** button. You will be directed to the **EDGE Server Truncation Extension Request** page.

Note: The Test and Validation Zone options will be disabled when you choose an extension request as extensions are not applicable to the Test or Validation Zone.

Figure 25: EDGE Server Truncation Extension Request Radio Button



6.1 EDGE Server Truncation Extension Request Page

The **EDGE Server Truncation Extension Request** page requires you to enter the previous Truncation Request ID to populate information from that request.

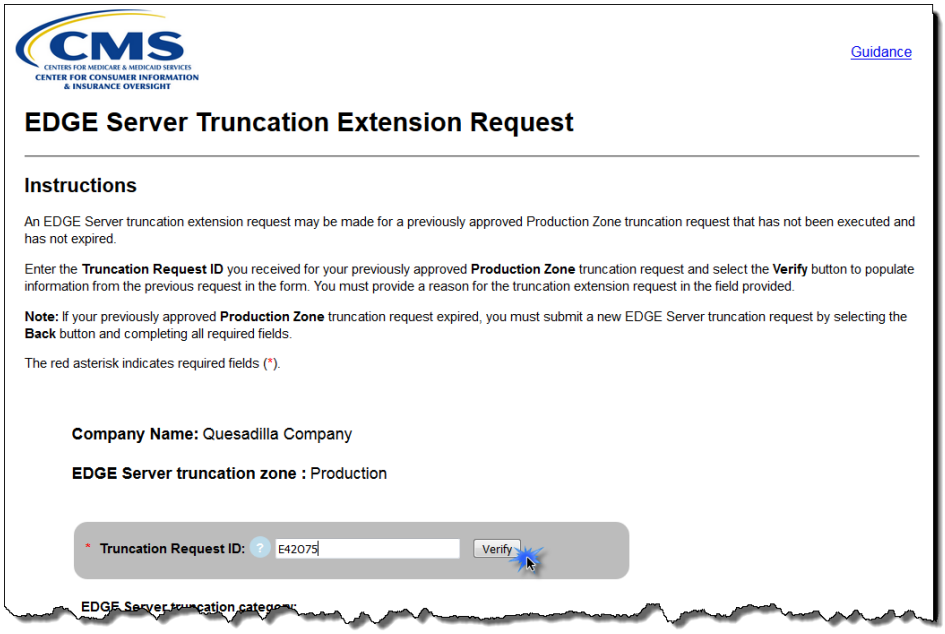
Note: If your previously approved Production Zone truncation request expired, you cannot submit a truncation extension request. You must submit a new EDGE Server truncation request by selecting the Back button and completing all required fields for a new truncation request.

Follow these steps to complete the **EDGE Server Truncation Extension Request** page:

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, send an email to raripaymentoperations@cms.hhs.gov. Include at least one HIOS ID and the words EDGE truncation in the subject line.

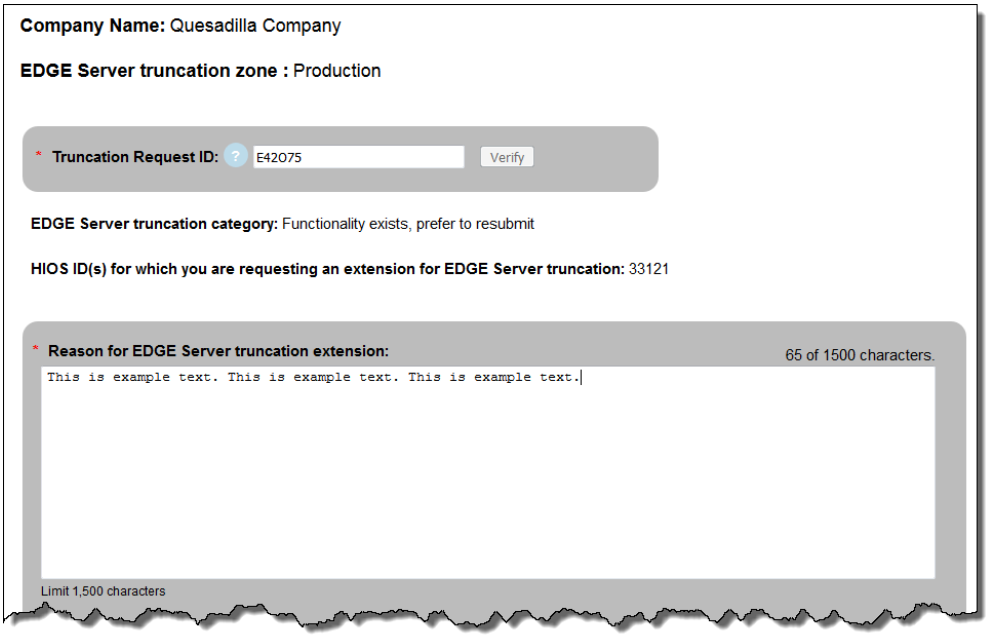
2. Select the **Verify** button to continue.

Figure 26: Truncation Request ID



3. Enter the reason for your truncation extension request, 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.

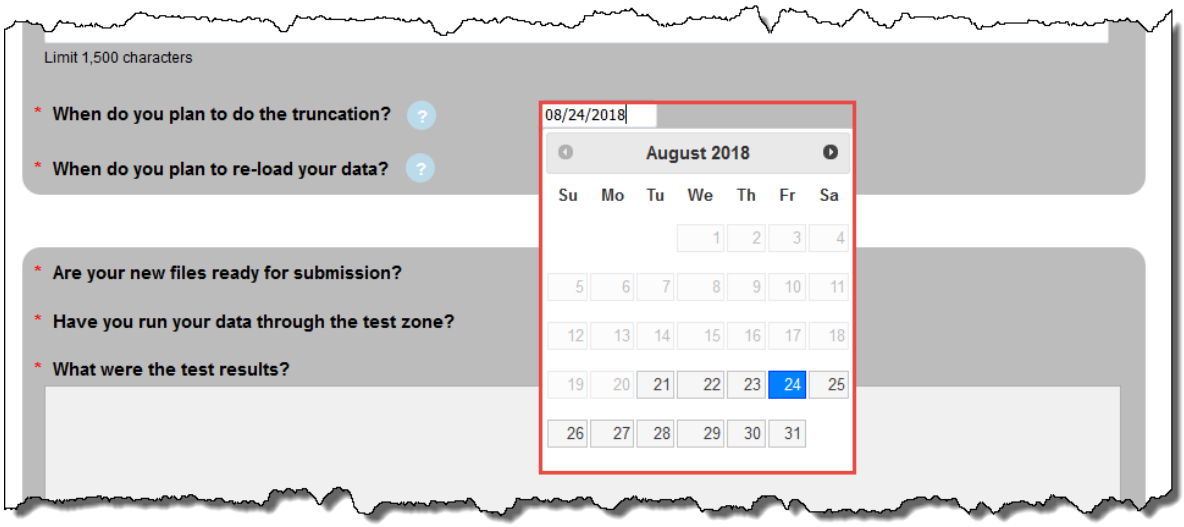
Figure 27: Truncation Extension Request Reason



4. Enter the planned truncation date in the ***When do you plan to do the truncation?*** field.

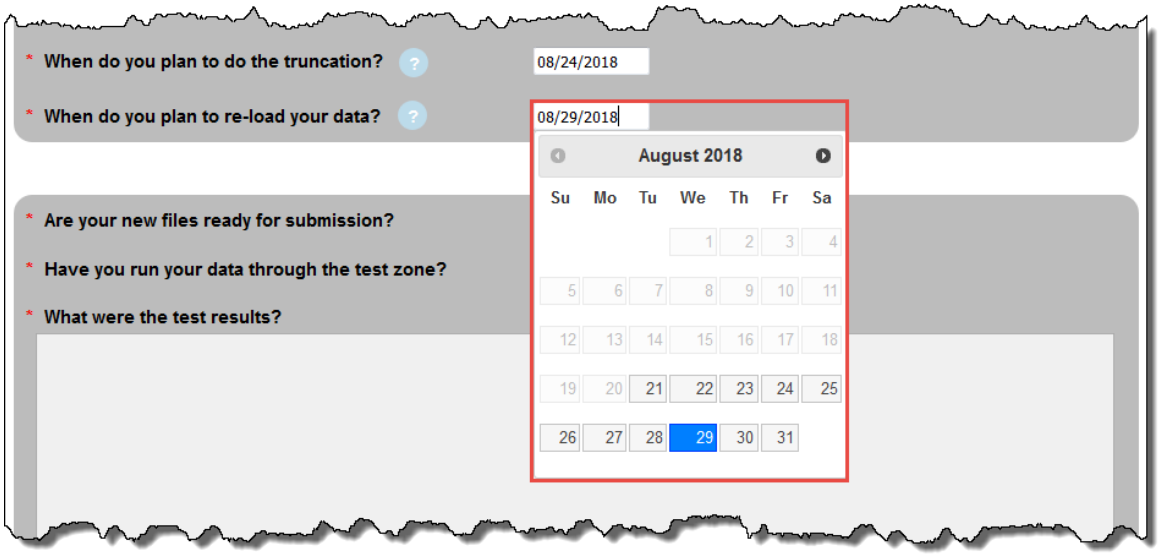
> **Note: This date must be at least one business day from today's date.**

Figure 28: Planned Truncation Date



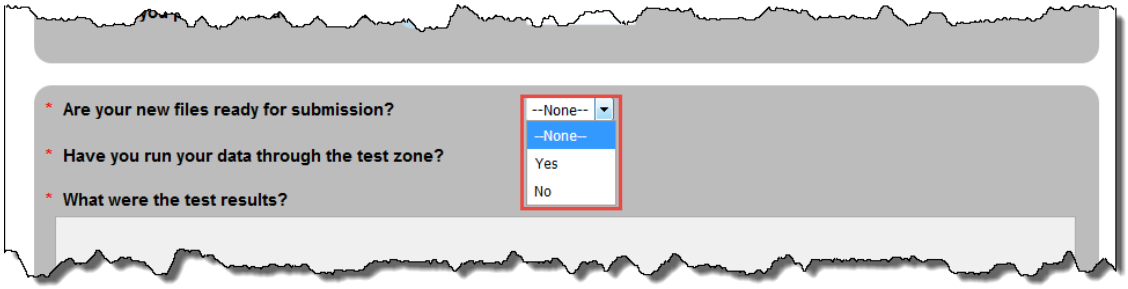
5. Enter your planned re-load date in the ***When do you plan to re-load your data?*** field. This date must be greater than or equal to the planned truncation date, and must also be no more than seven days after the planned truncation date.

Figure 29: Planned Re-load Date Selection



6. Select Yes or No from the ***Are your new files ready for submission?*** drop-down list.

Figure 30: Files Ready for Submission Selection

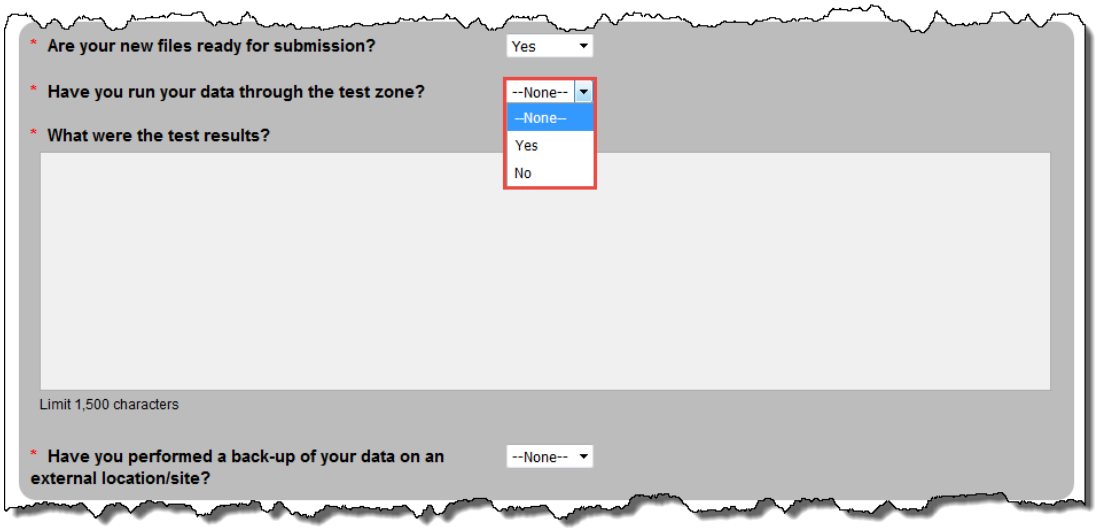


7. Select Yes or No from the ***Have you run your data through the test zone?*** drop-down list.

Table 4: Test Results Selection

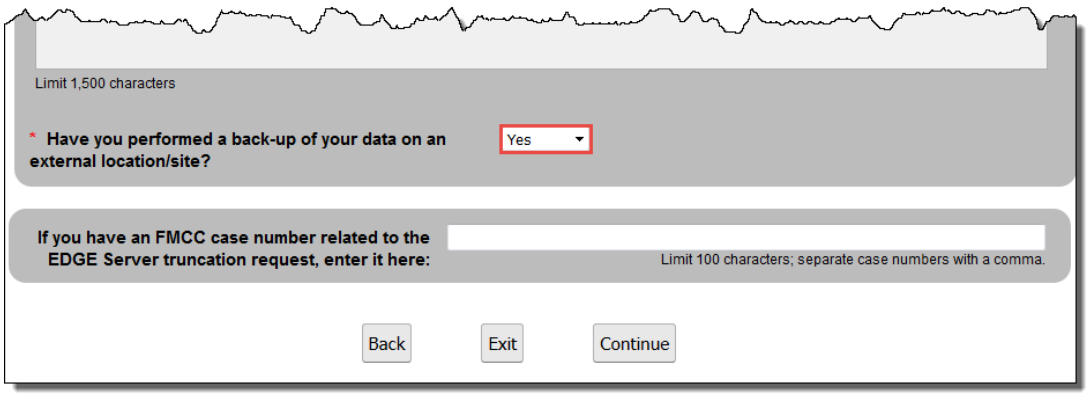
If	Then
Yes	The ***What were the test results?*** field is required. Enter your test results here. This field has a limit of 1,500 characters.
No	Continue to Step 8.

Figure 31: Data Test Selection



8. Select Yes or No from the ***Have you performed a back-up of your data on an external location/site?*** drop-down list.

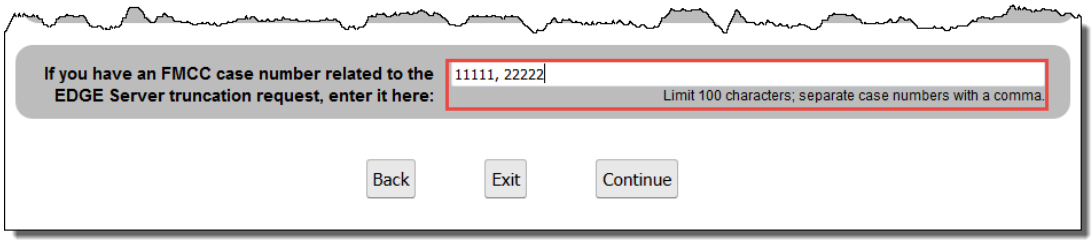
Figure 32: Data Back-up Selection



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.

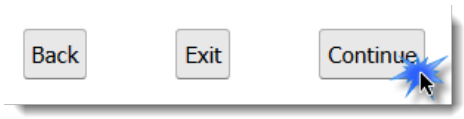
Note: This field is optional and has a limit of 100 characters.

Figure 33: FMCC Number Input



10. Select the **Continue** button. You will be directed to the **Summary** page of the form.

Figure 34: Continue Button



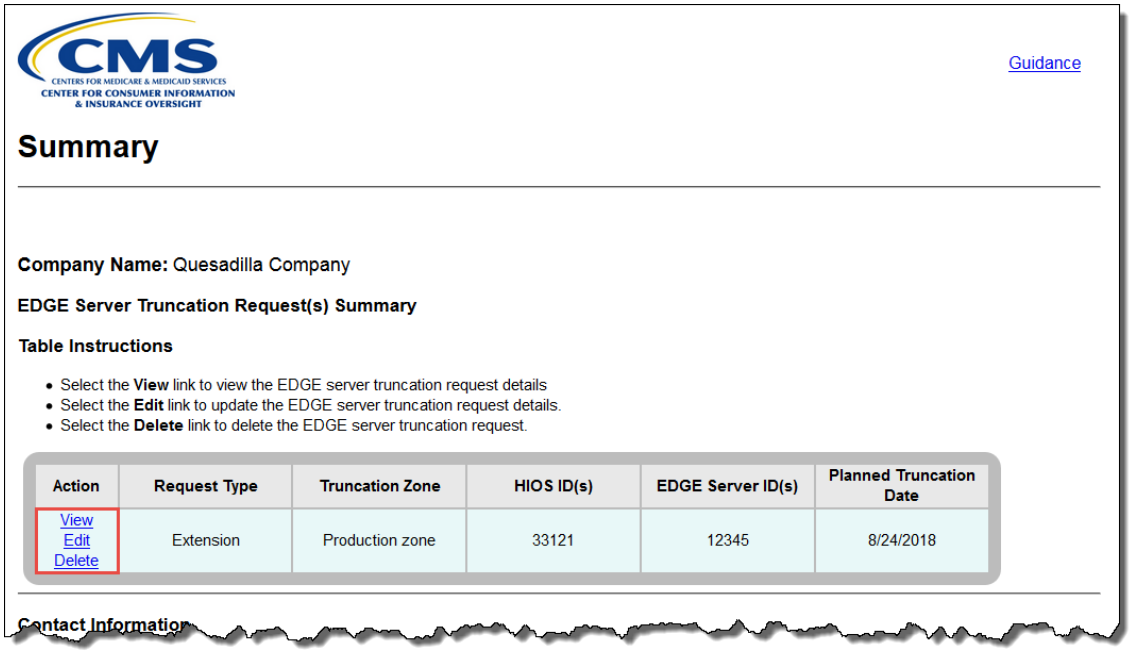
6.2 Summary Page

The **Summary** page allows you to view and edit EDGE server truncation extension request details and contact information. Follow these steps to complete the **Summary** page:

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.

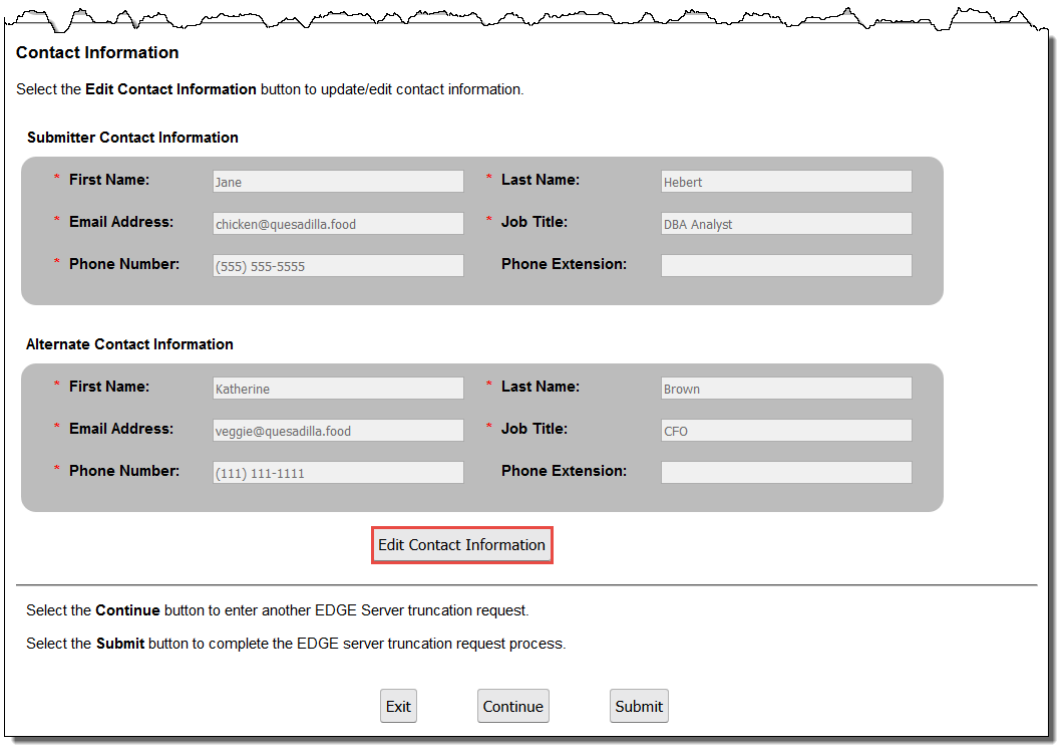
- Select the View link to view the EDGE server truncation extension request details
- Select the Edit link to update the EDGE server truncation extension request details
- Select the Delete link to delete the EDGE server truncation extension request

Figure 35: EDGE Server Truncation Request(s) Summary Table



2. Review the Contact information summary. If needed, select the **Edit Contact Information** button to update the information.

Figure 36: Contact Information Summary



3. Select the appropriate button to navigate to the appropriate page.

Table 5: Summary Page

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

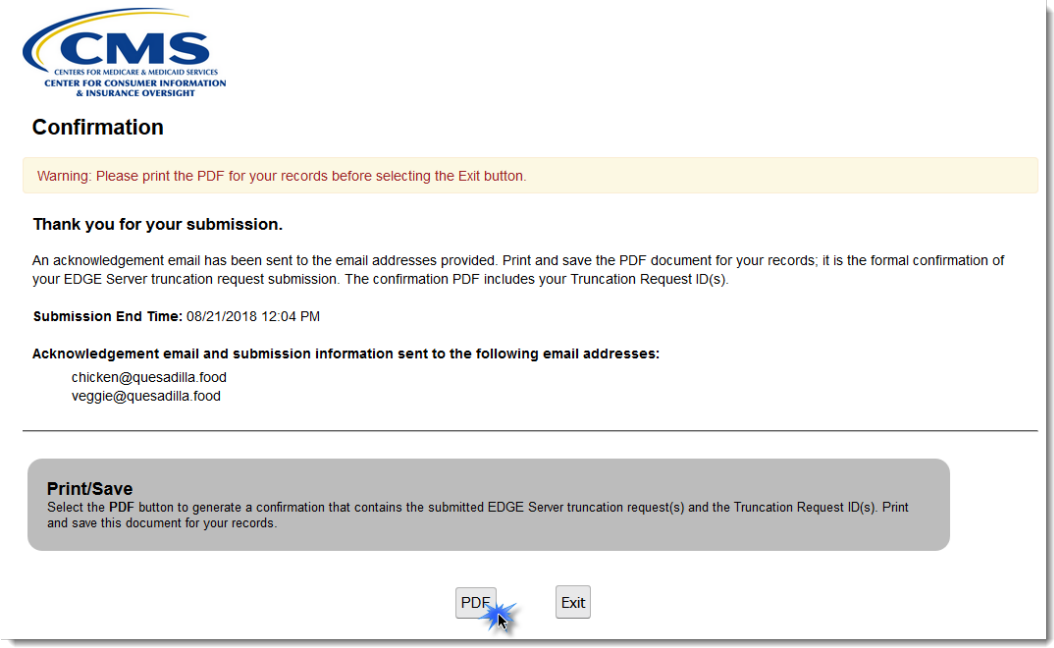
6.3 Confirmation Page

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 extension request submission. It is recommended that you save and print a PDF of the confirmation for your records. The PDF generated on the **Confirmation** page will not be attached to the acknowledgment email.

Follow these steps to complete the **Confirmation** page:

1. Select the **PDF** button to print/save the confirmation for your records.

Figure 37: Confirmation Page



2. Once your confirmation has been printed and/or saved, select the **Exit** button to exit the web form.

Figure 38: Exit Button

